

ForwardHealth interChange Internet Partner Portal Training Guide For Division of Juvenile Corrections Staff

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1 Introduction

1.1 Introduction

This document is a training guide for the navigation and use of the public and secure areas of the **ForwardHealth Partner Portal**.

The ForwardHealth public Partner portal replaces EDSNET and supplies users with online functionality that offers greater flexibility along with the ability to access real-time information.

1.2 Purpose

The purpose of this document is to provide users with an overview of the components that make up the ForwardHealth interChange Partner portal and to provide instruction on how to navigate and perform basic functions in the system.

1.3 Key Terms and Concepts

1.3.1 *ForwardHealth Wisconsin*

- ForwardHealth brings together many state health care programs with the goal of creating efficiencies for providers and other stakeholders and improving health care outcomes for enrolled members.
 - BadgerCare Plus.
 - Wisconsin Medicaid, including Family Planning Waiver.
 - Wisconsin Well Woman (WWW) Program and WWW Medicaid.
 - SeniorCare.
 - Wisconsin Chronic Disease Program (WCDP).
 - BadgerCare Plus and Medicaid managed care programs.

1.3.2 *ForwardHealth InterChange (iC)*

- ForwardHealth interChange is a new system which replaces the Medicaid Management Information System (MMIS) which has been in place since 1977.
- Connectivity to the legacy MMIS is being discontinued with the implementation of ForwardHealth interChange.
- Partners will access the new system using the ForwardHealth Portal. The portal will provide access to key information that was previously found on EDSNET.

1.3.3 *Key Terms*

- **Member** - Replaces the term "Recipient". A Member represents an individual enrolled in any of the ForwardHealth health care programs in iC.

- **Member ID** - All members are assigned an ID. This number will replace the old MA ID number. The number is assigned from the Master Client Index (MCI) and will no longer include the SSN.
- **Benefit Plan** -Type of plan that designates the benefits covered and is based on the member's medical status code. Members may be enrolled in multiple benefit plans concurrently.
 - Example: SeniorCare and QMB.
 - Example: QMB and EBD Medicaid.
- **Enrollment** - Replaces the term "eligibility". Enrollment is used anytime a reference is made to a member who is eligible. A member may also be enrolled in a Managed Care program.
- **Fiscal Agent** – EDS-HP is the fiscal agent for the Wisconsin Medicaid and ForwardHealth Programs.

2 Getting Started

2.1.1 Passwords & Security

ForwardHealth Partner Portal

General Password guidelines

- All portal users can change their password at any time. After logging in, you can click on the **Account** link on the secure Partner home page and then click the **Change Password** link on the Account home page.
- Portal account passwords expire every 60 days and users are prompted to change them.
- The password you create **MUST** have at least **eight** characters.
- Passwords must contain at least one **uppercase** letter, one **lowercase** letter, and one **number**.
- Passwords must not contain your real name or user name.
- When resetting your password, you cannot use any of your previous eight passwords.
- If you forgot your password, you can reset it yourself by answering security questions you will be asked to provide when you change the initial password you receive.

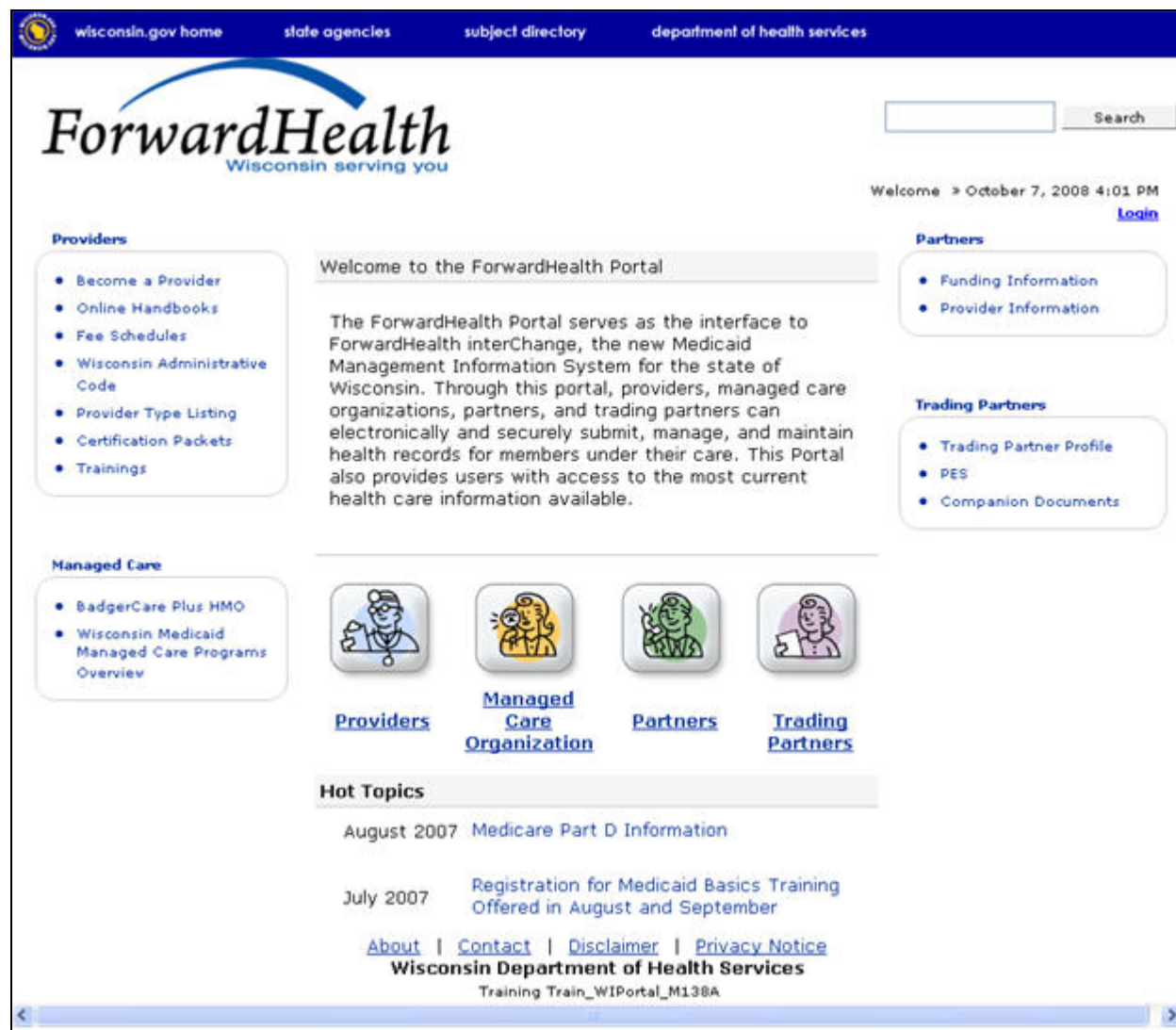
ForwardHealth interChange Password Problems

- For assistance with interChange password problems or any other questions on the Partner Portal, please contact the Portal Helpdesk at (866) 908-1363.

3 ForwardHealth Partners Home Panel

Step	Action	Response
1.	Click the portal icon on your desktop, or enter https://www.forwardhealth.wi.gov/ in the address bar in Internet Explorer, and click Go .	The public portal Home page displays.

ForwardHealth Main Portal Home Page Screen Graphic



ForwardHealth Main Portal Home Page Screen Description

- As you can see, the **ForwardHealth Portal** is divided into four main areas as indicated by the four icons in the middle of the page. Users can click on an icon, or the link below the icon, to go to that area of the portal.

- Today we are focusing on the secure Partner portal for Division of Juvenile Corrections Staff.

3.1 Access the Partner Portal

Step	Action	Response
1.	Click the Partners icon.	The Partners public portal home page displays.

Partners Home Page Graphic

wisconsin.gov home state agencies subject directory department of health services

ForwardHealth
Wisconsin serving you

interChange
Partner

Welcome > October 20, 2008 3:29 PM [Login](#)

The Partner site is specifically designed to provide up-to-date ForwardHealth information and functionality specific to the following partners:

- Income Maintenance Workers/Coordinators
- Katie Beckett Program staff
- FosterCare and Subsidized Adoption workers
- Managed Care Organization Enrollment Brokers
- Child Support staff
- Wisconsin Well Woman Program Local Coordinating Agencies (LCAs)
- Social Security Administration (SSA)
- Aging and Disability Resource Centers (ADRCs)
- Subrogation workers
- Women, Infants, and Children (WIC) workers
- Wisconsin Department of Justice
- MetaStar
- Wisconsin Division of Juvenile Corrections

Partners should log in to the secure Partner Portal using the login area to the right on this page. The secure Partner Portal is designed to provide functions to each partner specific to the partner's relationship to the Department of Health Services and the various ForwardHealth programs as appropriate.

Accessing the Secure Partner Site

Many partner users were emailed their login information during October 2008. If you received your login information, you do not need to request access and can immediately enter your login information in the "Login to Secure Site" area to the right.

If you did not receive your login information in October 2008, you will need to request access by clicking the link below and completing the necessary request information.

[Request Secure Partner Site](#)

Find a Provider

Search for providers by different criteria such as county, city, state and zip code.

Related Programs and Services

Use related programs & services to access information for all ForwardHealth programs as well as other programs and services. [Go >](#)

Member Resources

Use Member Resources to access information and resources specific to members of ForwardHealth programs. [Go >](#)

Trainings

Use Trainings to view up-to-date training offerings for your specialty or interest and then register for courses via the web. [Go >](#)

[About](#) | [Contact](#) | [Disclaimer](#) | [Privacy Notice](#)
Wisconsin Department of Health Services
Model Office Train_WIPortal_M141A

Login to Secure Site

Username

Password

• [Forgot your password?](#)
• [Account Users Guide](#)

Quick Links

- [LTCare Encounter Reporting](#)
- [LTC Functional Screen](#)
- [Max Fee Schedules](#)
- [Portal Access Request Application](#)

Partners Home Page Description

- As you can see, this screen provides links to some basic information that can be accessed by users who are not logged in, such as finding a provider and contact information for Members interested in applying for BadgerCare Plus benefits.
- On the left of the screen are text entry fields where users can enter their login information for access to the Partner secure site.
- If you received your login information, you do not need to request access and can immediately enter your login information in the "**Login to Secure Site**" area to the right.
- If you did **not** receive your login information, you will need to request access by clicking the **Request Secure Partner Site** link and completing the necessary request information.

3.2 Request Secure Partner Site

Step	Action	Response
1.	From Partners public portal home page, click Request Secure Partner Site .	The Portal Access Request Information panel displays.

Portal Access Request Information Graphic

Portal Access Request Information

Required fields are indicated with an asterisk (*).

- Requested User ID must be Alphanumeric.
- Requested User ID can not begin with a number.
- Requested User ID must be at least 6 characters in length.
- Requested User ID can not be greater than 20 characters.

User Information

First Name*

Last Name*

E-Mail Address*

Confirm E-Mail*

Requested User ID*

Work Phone Number* Ext.

Role*

Date Requested

Security Agreement

or Federal court in Dane County, Wisconsin.

21. ENTIRE AGREEMENT. This Agreement and any Manuals, Guides, Exhibits, Applications and Attachments thereto constitutes the entire Agreement between the Parties with respect to its subject matter except as expressly provided herein. The provisions of this Agreement supersede all prior oral or written quotations, communications, agreements and understandings of the Parties with respect thereto.

SIGNATURES. Clicking "Yes, I Agree" constitutes a signature and your approval of this agreement, including all terms and conditions listed therein

☐ Please check the box if you have read and agreed to Wisconsin's User Security Agreement.

Step	Action	Response
2.	Enter the requested information in all fields. All fields must be filled out.	
3.	Read the Security Agreement and check the box at the bottom of the screen to confirm that you read the agreement and agree to the conditions.	
4.	Click Next .	The Portal Access Additional Information screen displays.

Portal Access Additional Information

Step	Action	Response
3.	Use the drop-down menu at the top of the screen to select your Site Code.	
4.	Click Submit .	If there are no problems with the request, a confirmation message will display above the panel. If there is a problem with the request, an error message will display.

Confirmation Message

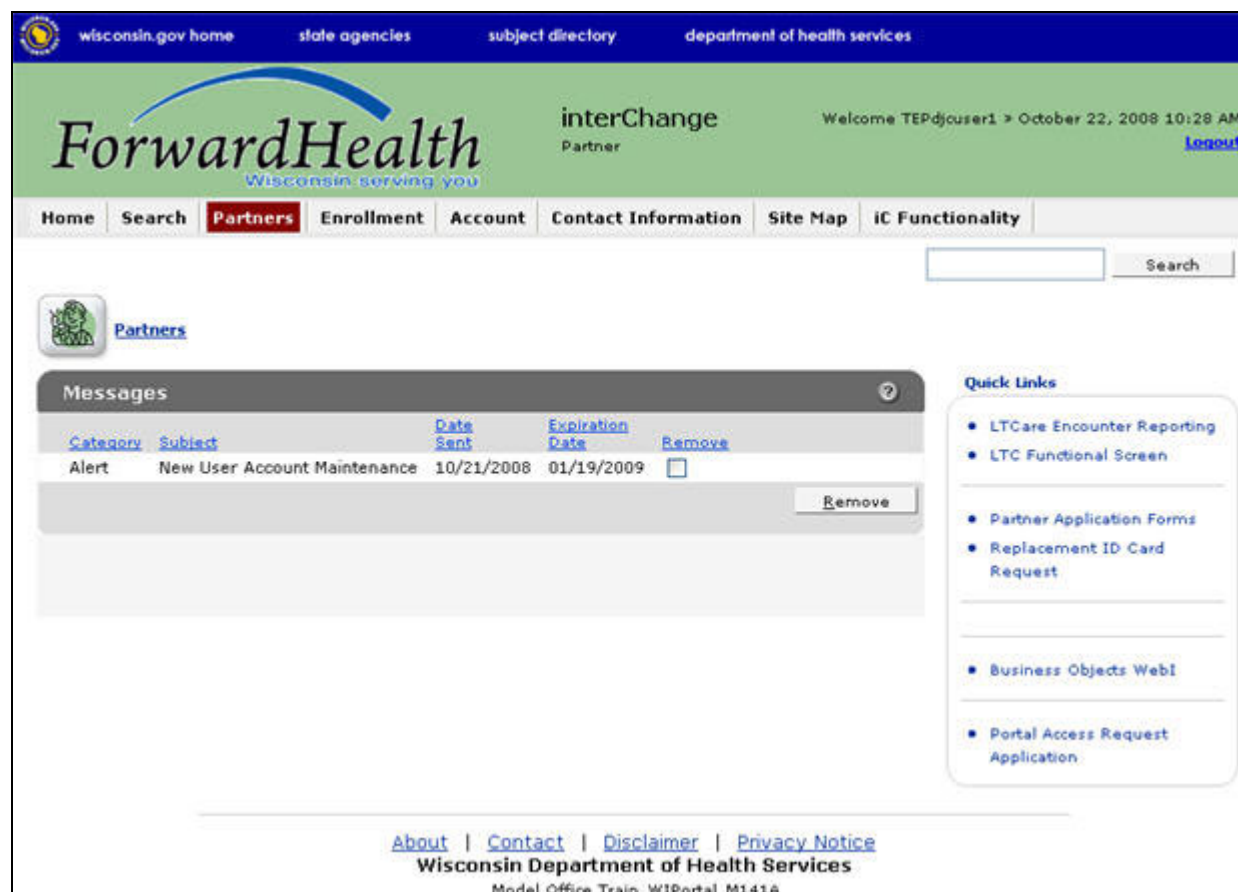
The following messages were generated:
Save was successful. If your request is approved, you will receive emails with your login credentials.

- **Note that if your request is approved, you will receive emails with your login credentials.**

3.3 Log into the Partner Portal

Step	Action	Response
1.	Enter your user name in the Username field.	
2.	Enter your password in the Password field.	
3.	Click Go .	The Partners secure page displays

ForwardHealth Partner Home Page Graphic



ForwardHealth Partner Home Page Screen Description

- Through the Partner portal, users can access the following functions:
 - Enrollment verification
 - Account management
 - Member maintenance
 - TPL information
 - Provider information

- There are quick links that appear on the right of the screen:
 - **Partner Application Forms** – to access applications available for online completion.
 - **Replacement ID Card Request** – to request replacement ID Cards for members.
 - **Business Objects WebI** – where you can access various reports via the ForwardHealth data warehouse (See below).
- One of the features of the portal to help you track where you are is the navigation map, which is at the upper left of the screen, beginning with the Partners graphic:



- The link shows you which area of the secure portal site you are in, along with what tab or link you've clicked. You can also click on either the graphic or any of the links displayed after the graphic (e.g. **Partners**).
- Notice there are tabs along the top of this page, with Partners automatically selected:
 - **Home** - Is the public portal Home page
 - **Search** - Lets you search for information using a keyword.
 - **Partners** – Takes you to the Partners secure home page.
 - **Enrollment** — Lets you search for a member's summary enrollment data.
 - **Account**— Lets you update the information associated with your Username and Password. You can set up, update and maintain account login credentials, change/reset passwords, assign roles for authorized employees, and read and manage messages pertaining to your account, such as your email.

Note: The Account tab let's you manage your account. Although we don't discuss this information in detail, there is a detailed user guide (the Account User Guide link) in PDF format for you to use if you need to change any of your account information.

- **Contact Information** — allows you to contact ForwardHealth with questions about the ForwardHealth programs and the Partner Portal.
- **Site Map**—Shortcut links to the main topics on the Partners portal.
- **iC Functionality**—Lets you access more detailed member information from interChange.

Note: You may notice that each time you click a tab, or move from screen to screen, you see the "this site contains secure and non-secure..." message. Click **Yes** to continue, if you see this screen. The message appears if your security level for your Internet is set to prompt you whenever you are about to display non-secure information, which you can change through Internet options, security.

3.3.1 Business Objects WebI

Step	Action	Response
1.	In the Quick Links panel on the secure partner home page, click the Business Objects WebI link.	The Webi Home page displays.



- Clicking the Business Objects WebI link directs you to the Business Objects Web Intelligence reporting tool, where you can access reports via the ForwardHealth data warehouse. You will need to have a login ID and password to access this site.

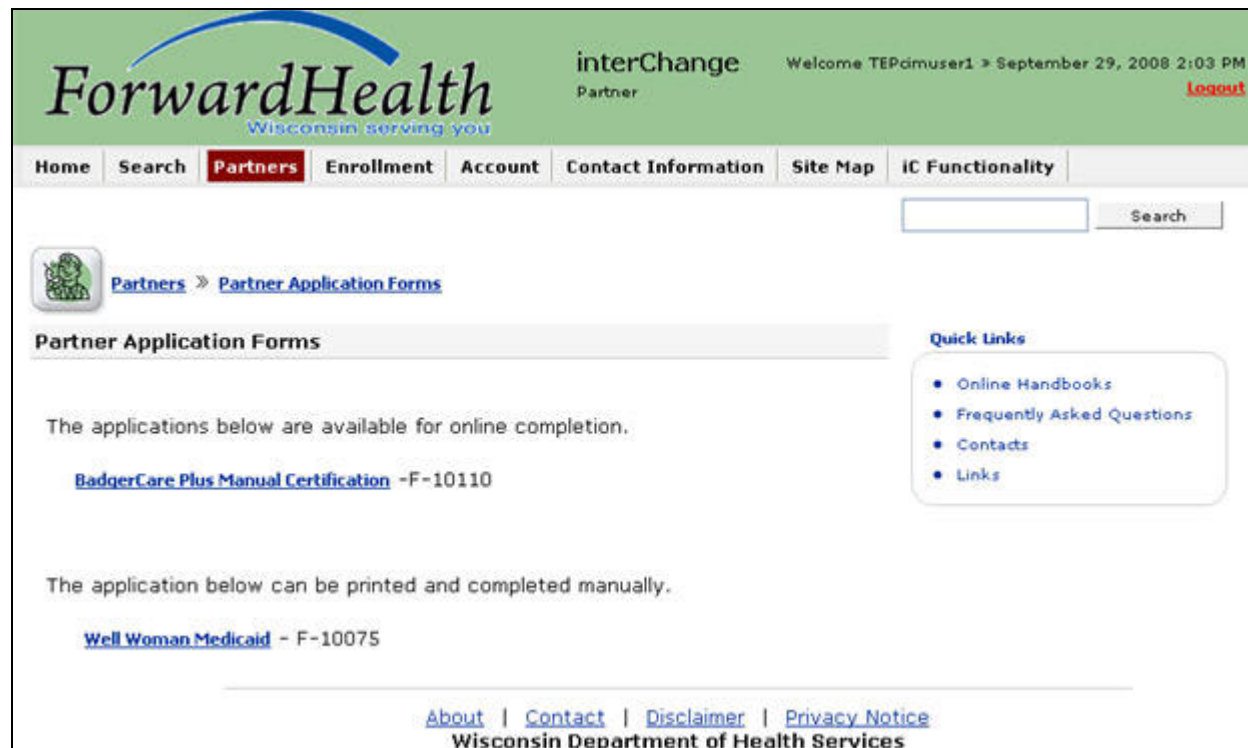


4 Accessing the Manual Certification Screens

- The BadgerCare Plus Manual Certification replaces the paper manual F-10110 (3070). **You will use this manual certification for all programs for which you currently use the paper manual certification, even though it is called the BadgerCare Plus Certification.**
- You may continue to use the paper manual certification, but are encouraged to utilize this certification tool for routine and/or emergency enrollments. The update is immediate once you submit the certification and enrollment is there for providers to see moments after submission.

Step	Action	Response
1.	From the Partner's main screen, click the Partner Applications Forms link at the right, under Quick Links .	The Partner Applications Forms page displays.

BadgerCare Plus/Medicaid Manual Certification Screen Graphic



BadgerCare Plus/Medicaid Manual Certification Screen Description

- This **Partner Application Forms** link allows you to add or modify one or more case members' enrollment using BadgerCare Plus/Medicaid Manual Certification. You can also use this panel to add a new case with multiple members.
- Processing errors will be displayed as a red exclamation point next to the field or as a message at the top of the panel. Errors must be corrected before allowed to proceed to the next screen or with the certification submission.
- ID cards for new members will be mailed the following business day.

General Manual Certification Processing Notes:

- The system will time out if there is no activity for 30 minutes. However, the clock will re-set every time the user hits the "**next**" button.
- **NEVER** use your browser "**Back**" button to return to a previous screen. Always use the "**Previous**" button or click on the applicable link listed next to the Partners Icon above the manual certification panel.

4.1 BadgerCare Plus/Medicaid Manual Certification

4.1.1 Initial Information Panel

Step	Action	Response
1.	Click BadgerCare Plus/Medicaid Manual Certification .	The Initial Information panel displays.

Initial Information Panel Graphic

The screenshot displays the ForwardHealth interChange Partner Portal. The header includes the ForwardHealth logo, the text "interChange Partner", and a welcome message "Welcome TEPcimuser1 > September 29, 2008 2:11 PM" with a "Logout" link. A navigation bar contains links: Home, Search, Partners (highlighted), Enrollment, Account, Contact Information, Site Map, and IC Functionality. Below the navigation bar is a search box. The main content area shows a breadcrumb trail: Partners > Partner Application Forms > Manual Certification. Underneath is a link for "Initial Information". The "Initial Information" panel has a title bar with a question mark icon. Below the title bar, it states "Required fields are indicated with an asterisk (*)". There is a dropdown menu labeled "Select Certification Type*" with a downward arrow. At the bottom of the panel is a "Next" button.

- The **Initial Information** screen requires you to choose one of two Certification Types.
 - a. Add a new case/member record. Equivalent to the old cert. 1
 - b. Modify, or add a new member to, an existing case. Equivalent to the old cert. 3 & 4.
- If unsure which certification type to use, select "**Modify**" a case to start. If the member is not in iC, you will receive a message and can change the type to "**Add**".

Note: You no longer have the ability to change the ID number of a member (the old Cert 5s) through the portal or any other means. Member ID number change requests must be called into EDS (See **Contact Information** at the end of the training guide). The reason for this policy/process change is that the MCI ID is considered a permanent ID; therefore, ID number changes should be very rare.

4.1.2 Process for Adding a New Case (Cert. 1)

Step	Action	Response
1.	Select Add a new case/member record and click Next .	The Case Head Information Panel displays.

- The Case Head information panel is used to add the new case head, or primary person, demographic data.

Case Head Information Screen Graphic

wisconsin.gov home state agencies subject directory department of health services

ForwardHealth interChange Partner

Welcome cimouser » September 9, 2008 3:25 PM [Logout](#)

[Home](#) [Search](#) [Partners](#) [Enrollment](#) [Account](#) [Contact Information](#) [Site Map](#) [iC Functionality](#)

[Partners](#) » [Partner Application Forms](#) » [Manual Certification](#)

[Initial Information](#) » [Verify Member](#) » [Case Head Information](#)

Case Head Information

Required fields are indicated with an asterisk (*).

Please enter the name and address information of the person that is considered the primary person of the case.

Case Number

First Name* Middle Initial

Last Name* Suffix

Certifying Agency Number* [\[Search \]](#) Certifying Agency Site*

Worker ID*

Mailing Address

In Care Of

Street 1*

Street 2

City*

State / Zip Code* -

County of Residence*

[Previous](#) [Next](#) [Cancel](#)

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Wisconsin Department of Health Services

WIPortal UAT UAT_WIPortal_M136A

Case Head Information Screen Description

- In order to establish a new case head, enter the demographic data for the person who is considered the primary person of the case. If a one-member case, the member will be their own case head and you will enter the member's information here.
- You must enter the required case head information, to proceed to the next screen.
- Required fields are marked with asterisks.
 - The **Case Number** is not active with a new case certification. The case head ID will automatically be assigned in the iC system once you have submitted the manual certification.
 - **First Name** and **Last Name** for the case head.
 - **Certifying Agency Number** and **Site** - if you know your county or certifying agency code plus the two digit site codes, enter the codes in these fields. If unsure you may click on the 'Search' link next to the field to display the Certifying Agency Number Data-Search Panel. **See the following section for instruction on how to use this panel.**
 - **In Care Of** - enter the name of the person or institution the case enrollment materials are sent to, if other than the case head/member.
 - **Street1** field is required.
 - **Street2** should be used for additional address information such as apartment, suite, etc.
 - **City, State/Zip Code** are required. The 4-digit zip add-on is not required.
 - **County of Residence** is a drop-down list box to select the member's actual residence county. The certifying agency and county of residence will be held separately in the new system.
 - In addition to the **Previous** and **Next** buttons, you also see a **Cancel** button. This button will take you completely out of the manual certification back to the Partner Application Forms page.
 - Here's an example of a completed panel:

Completed Case Head Panel

Case Head Information

Required fields are indicated with an asterisk (*).

Please enter the name and address information of the person that is considered the primary person of the case.

Case Number

First Name* GEORGE

Middle Initial L

Last Name* FRAMER

Suffix

Certifying Agency Number* 002 [Search]

Certifying Agency Site* 00

Worker ID* 546333

Mailing Address

In Care Of SMITH

Street 1* 460 MAPLE DRIVE

Street 2

City* ASHLAND

State / Zip Code* WI 45678

County of Residence* Ashland

Previous

Next

Cancel

Step	Action	Response
2.	Once you have reviewed the information on the completed panel, click Next .	The Eligible Case Members panel displays.

Certifying Agency Number Data-Search Panel

Step	Action	Response
1.	Click the Search link next to the Certifying Agency Number field.	The Certifying Agency Number Data-Search Panel displays

Certifying Agency Number Data-Search Panel Graphic

Certifying Agency Number [Close]

Search

Certifying Agency Number Certifying Agency Site

Certifying Agency Name Street 1

City County

Additional Phone Number

search * clear

Search Results

Certifying Agency Number	Certifying Agency Site	Certifying Agency Name	Street 1	City	County	Additional Phone Number
001	00	Adams Coun		Friendship	Adams	
001	20	Adams - Fo			Adams	
001	70	Adams - SS			Adams	
002	70	Ashland -			Ashland	
002	90	Ashland Co	Terri Kram	Ashland	Ashland	7156827924
002	20	Ashland -			Ashland	
002	00	Ashland Co	Court Hous	Ashland	Ashland	
003	20	Barron - F			Barron	
003	70	Barron - S			Barron	
003	90	Barron Cou	Barb Peter	Barron	Barron	7155376274

1 2 3 4 5 6 7 8 9 10 ... Next >

Step	Action	Response
2.	The fastest way to locate your agency and site is to enter your agency name in the Certifying Agency Name field. Note: Agency codes that are not based on actual county codes have been assigned new agency codes and sites. Please refer to the Agency Listings in the appendix at the end of this guide.	
3.	Click Search .	The Search Results panel will populate with the results of your search. If you enter a partial description, more than one result will display.

Certifying Agency Number Data-Search Search Results Panel Graphic

Certifying Agency Number [Close]

Search

Certifying Agency Number Certifying Agency Site

Certifying Agency Name Street 1

City County

Additional Phone Number

search * clear

Search Results

Certifying Agency Number	Certifying Agency Site	Certifying Agency Name	Street 1	City	County	Additional Phone Number
001	00	Adams Coun		Friendship		
001	70	Adams - SS				
001	20	Adams - Fo				

Step	Action	Response
4.	Select a record from the results list.	The Data-Search panel closes and the information automatically populates the correct fields on the Case Head Information panel.

Eligible Case Member Panel

Step	Action	Response
1.	Click Add .	The Eligible Case Members panel is now in edit mode, meaning users can enter information for the new case member.

Eligible Case Members Panel in Edit Mode

Eligible Case Member in Edit Mode Panel Description

- The Eligible Case Members panel allows you to add demographic and enrollment information for case members.
- Enter the case head enrollment information first and check the **Case Head** box. This will establish a case head record in iC and associate all new members to this case head.
- As you add additional members, information on the previous member entered is shown at the top of the panel. If you wish to change member data, click on a member in the list and the fields will populate with information previously entered. You can then change any field.

- Many of the fields on this panel are self-explanatory, but a few warrant some discussion:
 - The **Member ID** field is not active for a new Add. As with the case head ID, once the process is complete the member will automatically be assigned a member number in the iC system.
 - The **Medical Status Code**. Select a med stat code from the drop-down list. This list will include all med stats used by all certifying agencies. Be careful when selecting med stats ensure you are using codes that pertain to your specific program.
 - Every member must have a **Begin Date** and an **End Date**. *Use caution if using the open end date. If the member enrollment is not routinely monitored and terminated, if appropriate, the enrollment will stay open indefinitely.*
- Also note that besides the **Add** button, there is also a **Clear** button, which removes values in all the fields on this panel, and a **Delete** button, which removes the members selected from the list that have been added to the current case on the manual certification. This action will not delete an existing member from iC. The Cancel button returns user to the Partner Application Forms page.

Completed Eligible Case Member Panel

Eligible Case Members

Required fields are indicated with an asterisk (*).

Last Name	First Name	Member ID	Medical Status	Begin Date	End Date
READ	THOMAS		B5 BC Adult, >150% to 185%, premium	08/01/2008	

Type data below for new record.

Case Member

Member ID

First Name*

Last Name*

Date of Birth*

Date of Death

MCI ID ☐

Middle Initial

Suffix

Gender*

Social Security Number

No SSN ☐

Step	Action	Response
2.	Once you've reviewed the information on your completed panel, either click Add , to add additional members or click Next .	<p>If clicking Add, the information you entered for the first member appears at the top of the panel and the data fields are cleared for new data entry.</p> <p>If Next is chosen, you will proceed to the Summary panel. If you wish to verify member information entered, select Previous to return to the Eligible Case Members panel.</p>

Summary Panel

Step	Action	Response
1.	Review the Summary panel.	

Summary Panel Graphic

The screenshot displays the 'Summary' panel in the ForwardHealth interChange Partner portal. The page header includes the Wisconsin state logo and navigation links. The main content area is titled 'Summary' and contains the following instructions:

- The certification has been completed and is ready to submit. If any changes need to be made, please make them now by using this web site's navigation links and command buttons (not the browser's navigation buttons). Once the certification has been submitted, no more changes can be made.
- [Preview your request.](#)
This preview is a draft PDF version of the manual certification form and should not be submitted via mail or fax. After finalizing the certification request, a version will be available for you to save or print for your records.
- Select "Submit" to finalize the certification request.

At the bottom of the panel, there are buttons for 'Previous', 'Submit', and 'Cancel'. The footer includes links for 'About', 'Contact', 'Disclaimer', and 'Privacy Notice', along with the Wisconsin Department of Health Services logo and a version number 'WIPortal UAT UAT_WIPortal_M135A'.

Summary Panel Description

- This screen is your last chance to go back and make any changes before you **Submit** the manual certification. You can click the **Preview your request** link to display a PDF version of the manual certification form.
- New case head and member IDs are not populated on this version of the PDF. The IDs will be assigned once the certification is submitted.

Step	Action	Response
2.	When you are sure everything is correct, click Submit .	Any errors will appear at the top of the panel and must be corrected in order to resubmit the certification. If no errors, the Complete Panel will appear. Once the certification is submitted for the new case, iC will update immediately.

The screenshot displays the ForwardHealth interChange Partner Portal interface. At the top, a blue navigation bar contains links: wisconsin.gov home, state agencies, subject directory, and department of health services. Below this is a green header with the ForwardHealth logo (Wisconsin serving you) and the interChange Partner logo. A welcome message reads: "Welcome cimuser » October 15, 2008 8:03 AM" with a Logout link. A horizontal menu bar includes: Home, Search, Partners (highlighted), Enrollment, Account, Contact Information, Site Map, and IC Functionality. To the right of the menu is a search box with a Search button. Below the menu, a breadcrumb trail shows: Partners » Partner Application Forms » Manual Certification. A list of links follows: Initial Information » Verify Member » Case Head Information, Eligible Case Members » Summary » Complete. A dark grey banner with the word "Complete" and a question mark icon is present. Below the banner, the text states: "The certification request has been submitted." It then provides a link to "View your request." and explains: "You may view, print, and save a copy of the completed certification via the web." Finally, it offers a link to "Start a new request."

- You may select the **View your request** link to display the completed certification PDF which will include the Case Head and Member IDs that have been assigned by the system.
- A separate PDF will appear for each member.
- This version must be printed or saved as a Word document for importing if you want to keep a record of the certification. Once you leave the certification you've just completed, the PDF form will no longer be viewable for printing or saving as a word document.
- The PDF document should not be sent via mail or fax to EDS, because the information you entered online will be submitted in real time—sending by mail or fax is unnecessary.

STATE OF WISCONSIN DEPARTMENT OF WORKFORCE DEVELOPMENT Division of Economic Support										MEDICAID/BADGERCARE CERTIFICATION (Refer to back for instructions)																														
<div style="display: flex; justify-content: space-between;"> <div> <p>Required fields on all types of certification</p> <p>TYPE OF CERTIFICATION ACTION</p> <table border="1"> <tr> <td>Initial</td> <td>1</td> <td>Amended</td> <td>3</td> </tr> <tr> <td>Cancel</td> <td>4</td> <td>ID # change</td> <td>5</td> </tr> </table> <p>AGENCY NUMBER W2 AGENCY</p> <table border="1"> <tr> <td>013</td> <td>00</td> </tr> </table> <p>CASE NUMBER</p> <table border="1"> <tr> <td>9010000457</td> </tr> </table> <p>MED STAT CODE</p> <table border="1"> <tr> <td>BV</td> </tr> </table> <p>LAST PREVIOUS ID</p> <table border="1"> <tr> <td></td> </tr> </table> </div> <div> <p>CASE HEAD NAME AND MAILING ADDRESS</p> <p>Name (last, first, MI) MOORE, BIGSY</p> <p>In care of address:</p> <p>Street address 205 E. CLIN</p> <p>City State Zip MADISON WI 53704</p> <p>PERIOD OF CERTIFICATION</p> <p>from mo 02 day 02 yr 2008 thru mo 10 day 01 yr 2008</p> <p>CANCEL DATE</p> <table border="1"> <tr> <td>mo</td> <td>day</td> <td>yr</td> </tr> <tr> <td></td> <td></td> <td></td> </tr> </table> <p>NO. OF LINES</p> <table border="1"> <tr> <td>1</td> </tr> </table> <p>WORKER ID</p> <table border="1"> <tr> <td>JEFF</td> </tr> </table> </div> </div>																				Initial	1	Amended	3	Cancel	4	ID # change	5	013	00	9010000457	BV		mo	day	yr				1	JEFF
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Liability from date										Liability thru date																														
NH Liability amt										Date of Death																														
SAF										Buy-in Action Date mo yr																														
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Liability from date										Liability thru date																														
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SAF										Buy-in Action Date mo yr																														
Remarks																																								
I certify that this certification represents the official authorized action of the State Dept. of Workforce Development in accordance with § 49.05, 49.96, 49.47 and 49.685, Wisconsin statutes.										Signature of agency director or authorized representative Date Signed																														
Pune User										09/29/2008																														
<p>White copy: EDS-F Yellow copy: County agency case file Pink copy: County batch</p> <p>DES-3070 (R. 1/99)</p>																																								

4.1.3 Process to Modify or Add a New Member to an Existing Case (Cert. 3 or 4)

Initial Information Panel

Step	Action	Response
1.	Click BadgerCare Plus/Medicaid Manual Certification .	The Initial Information panel displays.

Initial Information Panel Graphic

Step	Action	Response
2.	Select Modify , or add a new member to, an existing case and click on Next .	The Case Head Information Panel will display.

Verify Member Panel

- The Verify Member Panel is used to verify that a specific member or case head record exists in the system. This panel will only display with the **"Modify"** certification type.

Step	Action	Response
3.	Enter the Case Head ID in the text entry field.	
4.	Click Next .	The Case Head Information panel displays with all case head demographics populated from iC. (See graphic below.) If the member ID does not exist, you will receive an error message. You can click on the Previous button to return to the Initial Information page to change the certification type to " Add ".

Case Head Information Panel

Case Head Information Screen Graphic

Case Head Information Screen Description

- The existing case head demographic data will display, with the exception of **certifying agency, site** and **worker ID**. You may change the demographic data displayed or make no changes; however, you must enter the certifying agency, site and worker ID information, to proceed to the next screen.
- Required fields are marked with asterisks.
 - The **Case Number** is populated with the current case head ID that is on iC. It may be a different ID than the one entered in the previous screen, if the case head has a new number.
 - The **Certifying Agency Number** and **Site**. Description of the Certifying Agency search table was described in the Process for Adding a Case, above.

- If there is data entered in the optional address fields that you want to remove from iC, you must delete the data from the field.
- In addition to the **Previous** and **Next** buttons, you also see a **Cancel** button. This button will take you back to the Partner Application Forms page.
- Here's an example of a completed Case Head panel:

Completed Case Head Panel

Case Head Information

Required fields are indicated with an asterisk (*).

Please enter the name and address information of the person that is considered the primary person of the case.

Case Number* 4644901329

First Name* NANCY

Middle Initial N

Last Name* SMITH

Suffix

Certifying Agency Number* 015

[Search]

Certifying Agency Site* 00

Worker ID* 546333

Mailing Address

In Care Of

Street 1* DROP CODE 588376

Street 2

City* STURGEON BAY

State / Zip Code* WI 54235 - 0000

County of Residence* 15 Door

Previous

Next

Cancel

Step	Action	Response
5.	Once you have reviewed or modified the information on case head panel, click Next .	The Eligible Case Members panel displays with all case members listed.

Eligible Case Members Panel

Step	Action	Response
1.	Click on a member in the list to modify information or click Add to add a member to the existing case. Note: Do not click on Add if adding new enrollment for an existing member.	The Eligible Case Members panel is now in edit mode, meaning users can modify or add information.

Eligible Case Member in Edit Mode Panel Graphic

Eligible Case Members

Required fields are indicated with an asterisk (*).

Last Name	First Name	Member ID	Medical Status	Begin Date	End Date
SMITH	EDDIE	3922101179	B1 BC Child, >100% to 150%	04/01/2007	12/31/2007
SMITH	EDDIE	3922101179	CM Child, age 2 - 6, 155%, med ndy	02/01/2007	03/31/2007
SMITH	EDDIE	3922101179	31 AFDC regular, cat ndy	03/01/2001	09/30/2001
SMITH	NANCY	4644901329	B4 BC Adult, >100% to 150%	01/01/2007	12/31/2007
SMITH	NANCY	4644901329	38 AFDC, cat ndy	05/01/2006	12/31/2006
SMITH	NANCY	4644901329	FS Family Planning Services	06/01/2003	06/30/2003
SMITH	NANCY	4644901329	B4 BC Adult, >100% to 150%	05/01/2003	05/31/2003
SMITH	NANCY	4644901329	PW Preg. woman, 133%, cat ndy	04/01/2003	04/30/2003

1 2 Next >

Type data below for new record.

Case Member

Member ID

First Name*

Last Name*

Date of Birth*

Date of Death

MCI ID

Middle Initial

Suffix

Gender*

Social Security Number

Tribal Indicator

No SSN

Medical Status Information

Medical Status Code*

Begin Date*

End Date

Open End Date

Delete

Add

Clear

Previous

Next

Cancel

Eligible Case Member in Edit Mode Panel Description

- The Eligible Case Members panel allows you to modify or add demographic and enrollment information for case members.
- If there are multiple members, they are listed at the top of the panel along with the enrollment data currently in iC. Clicking on a member displays and information for that member.

- Many of the fields on this panel are self-explanatory, but a few warrant some discussion:
 - The **Member ID** will populate with the current ID on iC.
 - If adding a member, the ID field will not be active, just as in the Adding a New Case. However, if you know the member already has an MCI ID, check the MCI ID box. (For example, they are in CARES with an MCI ID but not on iC yet). Otherwise, leave the MCI ID box unchecked for the system to assign the ID.
 - The **Medical Status Code**. Select a med stat code from the drop-down list. This list will include all med stats used by certifying agencies. Use caution to only use the med stats that pertain to your program.
 - You may extend the **Begin Date** to an earlier date and/or extend the **End Date** for a selected row.
 - To add a new period of eligibility for an existing member do NOT use the **Add** button. The **Add** button is only used to add a new member to a case. Instead, select the member's row showing the most recent enrollment. When the fields populate, change the med stat and/or enrollment dates. This will establish the new eligibility on file while preserving the previous eligibility.

Completed Eligible Case Member Panel

Eligible Case Members

Required fields are indicated with an asterisk (*).

Last Name	First Name	Member ID	Medical Status	Begin Date	End Date
ROSE	TIM	3902523449	CC Child, < 6, 133%, cat ndy	04/01/2007	12/31/2007
SMITH	EDDIE	3922101179	B1 BC Child, >100% to 150%	04/01/2007	12/31/2007
SMITH	EDDIE	3922101179	CM Child, age 2 - 6, 155%, med ndy	02/01/2007	03/31/2007
SMITH	EDDIE	3922101179	31 AFDC regular, cat ndy	03/01/2001	09/30/2001
SMITH	NANCY	4644901329	B4 BC Adult, >100% to 150%	01/01/2007	12/31/2007
SMITH	NANCY	4644901329	38 AFDC, cat ndy	05/01/2006	12/31/2006
SMITH	NANCY	4644901329	FS Family Planning Services	06/01/2003	06/30/2003
SMITH	NANCY	4644901329	B4 BC Adult, >100% to 150%	05/01/2003	05/31/2003
SMITH	NANCY	4644901329	PW Preg. woman, 133%, cat ndy	04/01/2003	04/30/2003

1 2 Next >

Type data below for new record.

Case Member

Member ID

3902523449

MCI ID

☐

First Name*

TIM

Middle Initial

J

Last Name*

ROSE

Suffix

Date of Birth*

03/06/2004

Gender*

Male

Date of Death

Social Security Number

000-00-0000

No SSN

☐

Tribal Indicator

Medical Status Information

Medical Status Code*

CC Child, < 6, 133%, cat ndy

Begin Date*

04/01/2007

End Date

12/31/2007

Open End Date

☐

Clear

Delete

Add

Previous

Next

Cancel

Step	Action	Response
2.	Once you've reviewed the information on your completed panel, either click on another member, Add , to add additional members or click Next .	<p>If clicking Add, the information you entered for the first member appears at the top of the panel.</p> <p>If Next is chosen, you will proceed to the Summary panel. If you wish to verify member information entered, select Previous to return to the Eligible Case Members panel.</p>

Summary Panel

Step	Action	Response
1.	Review the Summary panel.	

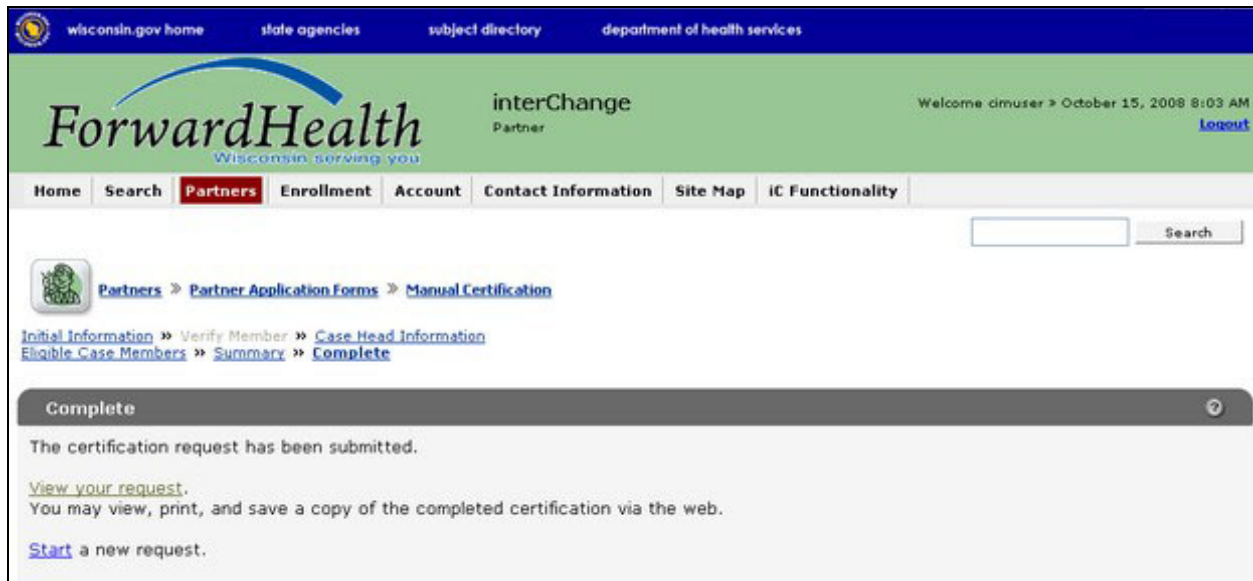
Summary Panel Graphic

The screenshot shows the ForwardHealth interChange Partner portal. The header includes navigation links: wisconsin.gov home, state agencies, subject directory, and department of health services. The main header features the ForwardHealth logo, the text 'interChange Partner', and a welcome message: 'Welcome dmuser > September 4, 2008 12:21 AM'. Below the header is a navigation bar with links: Home, Search, Partners (highlighted), Enrollment, Account, Contact Information, Online Handbooks, Site Map, and IC Functionality. A search box is located to the right of the navigation bar. The main content area shows a breadcrumb trail: Partners > Partner Application forms > Manual Certification. Below this are links for Initial Information, Verify Member, Case Head Information, Eligible Case Members, and Summary (highlighted). The Summary panel is titled 'Summary' and contains three bullet points: 1. The certification has been completed and is ready to submit. If any changes need to be made, please make them now by using this web site's navigation links and command buttons (not the browser's navigation buttons). Once the certification has been submitted, no more changes can be made. 2. Preview your request. This preview is a draft PDF version of the manual certification form and should not be submitted via mail or fax. After finalizing the certification request, a version will be available for you to save or print for your records. 3. Select "Submit" to finalize the certification request. At the bottom of the panel are buttons for Previous, Submit, and Cancel. The footer includes links for About, Contact, Disclaimer, and Privacy Notice, and the text 'Wisconsin Department of Health Services' and 'WIPortal UAT UAT_WIPortal_M135A'.

Summary Panel Description

- This screen is your last chance to go back and make any changes before you **Submit** the manual certification. You can click the **Preview your request** link to display a PDF version of the manual certification form for each member and period of enrollment.
- As with the Add certification type, if you've added a new member, their ID is not populated on this version of the PDF. The IDs will be assigned once the certification is submitted.

Step	Action	Response
2.	When you are sure everything is correct, click Submit .	<p>The BadgerCare Plus/Medicaid Manual Certification data is submitted to EDS. If no errors, the Complete panel will appear.</p> <p>If errors are detected, message(s) will appear at the top of the panel. These must be corrected in order to resubmit the certification.</p>
		Once the certification is submitted, iC will update immediately.



- You may select the **“View your request”** link to display the completed certification PDF which will include the Case Head and Member IDs that have been assigned by the system.
- A separate PDF will appear for each member.
- This version must be printed or saved as a Word document for importing if you want to keep a record of the certification. Once you leave the certification you’ve just completed, the PDF form will no longer be viewable for printing or saving as a word document.
- The PDF document should not be sent via mail or fax to EDS, because the information you entered online will be submitted in real time—sending by mail or fax is unnecessary.

STATE OF WISCONSIN DEPARTMENT OF WORKFORCE DEVELOPMENT Division of Economic Support		MEDICAID/BADGERCARE CERTIFICATION (Refer to back for instructions)			
-Required fields on all types of certification					
TYPE OF CERTIFICATION ACTION Initial 1 Amended 3 Cancel 4 ID # change 5			CASE HEAD NAME AND MAILING ADDRESS Name (last, first, MI) MOORE, BIGSY		
AGENCY NUMBER 013 00			W2 AGENCY Street address 206 E. CLIN City State Zip MADISON WI 45234		
CASE NUMBER 901000457					
MED STAT CODE BV			PERIOD OF CERTIFICATION from mo 02 day 02 yr 2008 thru mo 10 day 01 yr 2008		
LAST PREVIOUS ID CANCEL DATE mo day yr			NO. OF LINES 1		WORKER ID JEFF
ELIGIBLE CASE MEMBERS					
Control name YOB		Name (last, first, MI)		Current ID	
MOORE, BIGSY		901000457		Medicare Claim Number	
Birthdate	Sex	T18	Liability from date	Liability thru date	NH Liability amt
01/01/1970	F				\$
Date of Death		SAF	Buy-in Action Date		
			mo yr		
Control name YOB		Name (last, first, MI)		Current ID	
				Medicare Claim Number	
Birthdate	Sex	T18	Liability from date	Liability thru date	NH Liability amt
					\$
Date of Death		SAF	Buy-in Action Date		
			mo yr		
Control name YOB		Name (last, first, MI)		Current ID	
				Medicare Claim Number	
Birthdate	Sex	T18	Liability from date	Liability thru date	NH Liability amt
					\$
Date of Death		SAF	Buy-in Action Date		
			mo yr		
Control name YOB		Name (last, first, MI)		Current ID	
				Medicare Claim Number	
Birthdate	Sex	T18	Liability from date	Liability thru date	NH Liability amt
					\$
Date of Death		SAF	Buy-in Action Date		
			mo yr		
Control name YOB		Name (last, first, MI)		Current ID	
				Medicare Claim Number	
Birthdate	Sex	T18	Liability from date	Liability thru date	NH Liability amt
					\$
Date of Death		SAF	Buy-in Action Date		
			mo yr		
Remarks					
I certify that this certification represents the official authorized action of the State Dept. of Workforce Development in accordance with §. 40.05, 40.06, 40.47 and 40.065, Wisconsin statutes.				Signature of agency director or authorized representative Pune User	
				Date Signed 09/29/2008	
White copy: EDS-F		Yellow copy: County agency case file		Pink copy: County batch	
DES-3970 (R. 1/06)					

5 Replacement ID Card Request

Step	Action	Response
1.	From the Quick Links panel on the right of the Partner home page, click Replacement ID Card Request .	The ID Card Replacement panel displays.

Note: This ID card replacement function is available and optional to workers. IM workers should still refer members to Member Services for replacement cards. Effective 11/10/08, the member can go to ACCESS.wi.gov to request a replacement card if they have an ACCESS account.

ID Card Replacement Panel Graphic

ID Card Replacement ?

Required fields are indicated with an asterisk (*).

- Please enter the Member ID or Social Security Number and the date of birth.
- The date of birth must match the date of birth on file.
- If a previous card replacement request was made within the last 7 days, your request may be rejected.

Member ID

Social Security Number

Date Of Birth

Search

Step	Action	Response
1.	Enter either the Member ID , or the member's Social Security Number and Date of Birth .	
2.	Click Search .	If a member with eligibility is found, the panel refreshes with two new fields to enter further information.

ID Card Replacement

Required fields are indicated with an asterisk (*).

- Please enter the Member ID or Social Security Number and the date of birth.
- The date of birth must match the date of birth on file.
- If a previous card replacement request was made within the last 7 days, your request may be rejected.

Member ID

Social Security Number

Date Of Birth

Requested Card*

ForwardHealth ID Card

Issue Reason*

Damaged

Submit

Step	Action	Response
3.	In the Requested Card field, enter the card that is being requested.	
4.	In the Issue Reason field, enter the reason a new ID card is being requested.	
5.	Click Search .	<p>If there are no problems with the request, a confirmation message will display above the panel.</p> <p>If there is a problem with the request, an error message will display.</p>

- If the member is not currently eligible for one of the ForwardHealth programs, a message will display indicating that the member does not have eligibility.
- If the member has had an ID card request processed within the last 7 days, a message will appear rejecting the request. The reason for this is, if the member has had a card recently reissued, they may not have yet received the card and another card request is not necessary.

Successful Request

The following messages were generated:

ID card request was submitted.

ID Card Replacement

Required fields are indicated with an asterisk (*).

6 Enrollment Verification

Users can check a member's eligibility using the Enrollment Verification panel in the Enrollment section of the Secure Partner web.

Step	Action	Response
1.	From the Partner main menu at the top of the page, click Enrollment .	The Enrollment Verification panel displays.

Enrollment Verification Panel Graphic

ForwardHealth
Wisconsin serving you

interChange
Partner

Welcome dmcuser » September 24, 2008 2:16 PM
[Logout](#)

Home Search Partners **Enrollment** Account Contact Information Site Map iC Functionality

Enrollment

Search

Enrollment Verification ?

Required fields are indicated with an asterisk (*).
Either the Member ID or the Social Security Number and Date of Birth are required.

Program

Member ID

Social Security Number Date of Birth

From Date of Service* To Date of Service*

Step	Action	Response
1.	Select the program for which you want to certify eligibility from the Program drop-down menu.	
2.	Enter either the Member ID , or the member's Social Security Number and Date of Birth .	
3.	Enter the From Date of Service and To Date of Service , which are required fields.	
4.	Click Search .	The panel refreshes with the Member's eligibility information.

Enrollment Verification Graphic

Enrollment Verification

Required fields are indicated with an asterisk (*).
Either the Member ID or the Social Security Number and Date of Birth are required.

Program:

Member ID:

Social Security Number:

Date of Birth:

From Date of Service*: To Date of Service*:

For your reference, the transaction verification number for this search is 0827600002.

Search Results

Member ID: Name:

Date of Birth: County:

Benefit Plan

Payer	Benefit Plan	Effective Date	End Date
MEDICAID	Medicaid	01/01/2008	08/31/2008

- The results show the Financial Payer, Benefit plan, and Medicare coverage if any, and the effective and end dates of the plans.
- If there is no coverage for the member, a message will display.

7 iC Functionality

This section shows users how to access interChange information via the secure Partner Portal.

Step	Action	Response
1.	Click the iC Functionality tab.	A list of information panels users can access from interChange displays.

iC Functionality Graphic

The screenshot displays the ForwardHealth interChange Partner Portal interface. At the top, the ForwardHealth logo is on the left, and the interChange Partner logo is on the right. A welcome message reads "Welcome TEPdjuser1 » October 13, 2008 3:55 PM" with a "Logout" link. Below the header is a navigation bar with tabs: Home, Search, Partners, Enrollment, Account, Contact Information, Site Map, and iC Functionality (which is highlighted in red). To the right of the navigation bar is a search box with a "Search" button. The main content area is divided into several sections: "Member" with links for Member Search, Member Information, and Other ID Search; "Third Party Liability (TPL)" with links for TPL Search, TPL Information, and TPL Related Data; "Managed Care" with a link for Provider Search; "Provider" with a link for Provider Information; and "Claims" with a link for Claims Search.

- Let's start with Member iC Functionality.

7.1 Member

7.1.1 Member Search

Step	Action	Response
1.	From the list of iC Functionality links, click Member Search .	The Member Search panel displays.

Member Search Panel Graphic

Member Search Panel Description

- This panel allows you to search for a member using any of the fields displayed.
- Once you have entered information in the fields, click **Search** to initiate the search. Clicking the **Clear** button clears the information from all the fields.
- If searching by Member ID and the record is not found. Enter the ID in the Previous Member ID field in case the member's ID has changed.
- The **Sounds-like** checkbox on this panel can be used when you are searching by a member's name and are not sure of the correct spelling. Clicking the **Sounds-like** check box performs a phonetic search on the information contained in the last name field.
- To narrow down the results of your search, enter as much information about the member as possible.
- The **Records** drop-down is used to set the maximum number of records per page that are returned.

Search for a Member Record Using a Member's Name

Step	Action	Response
1.	Enter the member's last name in the Last Name field.	
2.	Enter the member's first name in the First Name field.	
3.	Click Search .	The Search Results panel displays.

Member Search Results Panel Graphic

Member Search

Member ID: Last Name: ROSE Sounds-like: ☐

Previous Member ID: First Name: TOM

Medicare ID: Previous Last Name:

Case Number: Previous First Name:

CARES Case: Birth Date:

CARES PIN: Gender:

SSN: County:

Records: 20 search clear

Search Results

Member ID	Last Name	First Name	MI	Birth Date	SSN	Medicare ID	Gender	County
1297831660	ROSE	TOM	R	06/25/1953	129-78-3165		F	Brown
3872968389	ROSE	TOM		01/01/2007	000-00-0000		M	Clark
3991984849	ROSE	TOM	I	07/11/2000	000-00-0000		M	Dane
4704130799	ROSE	TOM		01/16/2002	470-41-3079		M	Dane
3952553829	ROSE	TOM	A	10/27/2004	000-00-0000		F	Dane
3952558529	ROSE	TOM	L	10/28/2004	395-25-5852		M	Eau Claire
3892988289	ROSE	TOM	J	04/02/2007	000-00-0000		M	Kenosha
3871919709	ROSE	TOM	M	11/30/1998	000-00-0000		M	La Crosse
6058445599	ROSE	TOM	R	07/31/1995	605-84-4559		M	Milwaukee
8745468999	ROSE	TOM	M	10/07/2005	000-00-0000		M	Milwaukee
3921793329	ROSE	TOM	M	12/17/1997	000-00-0000		F	Milwaukee
3922161029	ROSE	TOM	R	04/10/2001	000-00-0000		M	Milwaukee
5961628179	ROSE	TOM		02/22/1988	596-16-2817		M	Milwaukee
3951988399	ROSE	TOM		01/15/2000	000-00-0000		F	Milwaukee
3892387699	ROSE	TOM	O	07/07/2002	000-00-0000		M	Milwaukee
3930442369	ROSE	TOM	A	01/14/1988	000-00-0000		M	Milwaukee
3882985669	ROSE	TOM	M	02/20/2007	000-00-0000		M	Milwaukee
3970258919	ROSE	TOM	A	09/19/1988	397-02-5891		F	Milwaukee
3368419219	ROSE	TOM	X	04/13/1990	336-84-1921		M	Outagamie
3891988549	ROSE	TOM	T	04/11/1999	000-00-0000		M	Rock

1 2 3 4 5 6 7 Next >

- If there was more than one member that meets the entered criteria, the list of members matching the entered criteria displays on the **Search Results** panel.
- Columns display for each record found in the search. You can click on a column heading to sort your results. Clicking a column once will sort the results in ascending order by that column. Clicking the column a second time sorts them in descending order.
- Selecting a row will populate the member information panel.

Step	Action	Response
3.	Click on the row you wish to view.	The Member Information panel displays.

Member Information Panel Graphic

Next search by: Member ID **Case Number**

Member Information			
Member ID	0780195603	Name	FALTO, JONOLA L
MCI Ind	No	Prev Name	
CARES Pin	0000000000	CARES Case	0000000000
Medicare ID		Address	C101 DRIVE
SSN	800-19-5603	Address 2	APT. A3
Gender	Male	Address 3	
Birth Date	12/17/1966	City	BRAT
Death Date		State	WI
Age	41	Zip	00104
Race	7 - Not Provided	Alt Address	No
Ethnicity	00 Not Applicable	Phone	
Language	UND - UNDETERMINED	Phone Type	No Phone
County	43 - Oneida	Add Phone	
Tribal Ind	No	Add Type	No Phone
Active	Active	Linked ID	
Case History	0780209151 10/18/07	Benefit Plan	FSTMA 01/23/84-07/31/84
Medicare Cov		Managed Care	
MC Special Cond		TPL	No
Lockin		NH Level of Care	
Patient Liability		Deductible	
Last HlthChk Scrn		Last HlthChk Dntl	

Member Maintenance Select area to add or modify below.

- [Member](#)
- [Managed Care](#)
- [Medicare](#)
- [Previous Data](#)
- [HealthCheck](#)
- [SSI](#)

[Member ID Cards](#) [Worker ID](#)

Member Information Panel Graphic

- The **Member Information** page is comprised of three separate panels including:
 - The mini-search panel that allows you to search for a new member record using a Member ID or Case Number.
 - The **Member Information** panel, located in the middle of the page, displays basic information about the member.
 - The **Member Maintenance** navigation panel, located at the bottom of the page is the access point for panels that contain more detailed member data. Let's take a look at the information on the **Member Information** panel.

7.1.2 Member Information Panel

Step	Action	Response
1.	Enter a valid Member ID in the Member ID field in the Search panel.	
2.	Click Search .	The information page for that Member ID displays.

Note: You no longer have the ability to change the ID number of a member (the old Cert 5s) through the portal or any other means. Member ID number change requests must be called into EDS-HP, See **Contact Information** at the end of the training guide.

Member Information Panel Graphic

Member Information			
Member ID	0780195603	Name	FALTO, JONOLA L
MCI Ind	No	Prev Name	
CARES Pin	0000000000	CARES Case	0000000000
Medicare ID		Address	C101 DRIVE
SSN	800-19-5603	Address 2	APT. A3
Gender	Male	Address 3	
Birth Date	12/17/1966	City	BRAT
Death Date		State	WI
Age	41	Zip	00104
Race	7 - Not Provided	Alt Address	No
Ethnicity	00 Not Applicable	Phone	
Language	UND - UNDETERMINED	Phone Type	No Phone
County	43 - Oneida	Add Phone	
Tribal Ind	No	Add Type	No Phone
Active	Active	Linked ID	
Case History	0780209151 10/18/07	Benefit Plan	FSTMA 01/23/84-07/31/84
Medicare Cov		Managed Care	
MC Special Cond		TPL	No
Lockin		NH Level of Care	
Patient Liability		Deductible	
Last HlthChk Scrn		Last HlthChk Dntd	

Member Information Panel Description

- The left section of the **Member Information** panel displays a high-level snapshot of a member's information at the time the page is accessed, including CARES PIN, SSN, gender, date of birth, age, etc.
 - The **MCI Indicator** field is a **Yes** or **No** field that indicates if the member ID is an MCI ID. If 'No', the member ID is a pseudo ID.
- The middle section of the Member Information panel displays address information and other demographic data about the member, including any previous name, if applicable. The address displayed is the member's mailing address.
- The right side of the Member Information panel contains more fields that require some additional explanation.
 - The **Active** field on the Member Information page pertains to the member ID, not enrollment. It indicates the member had two separate IDs and the two IDs are linked keeping one "Active" (Active Field=Yes) and the other "Inactive" (Active Field=No). The **Linked ID** field displays information if the member has another ID that is linked to their present ID.
 - The **Case History** field uses a drop-down menu to identify the case head member ID numbers and dates for cases the member is/was associated with.
 - The **Benefit Plan** field also has a drop-down menu that displays the benefit plans in which a member is/was enrolled. The field includes a benefit plan code and the effective dates of each plan.
 - The **Medicare Coverage** field contains the member's current Medicare coverage if **active**. It is blank if the member does not have active coverage. The field can show one or more of the following:

- ♦ **A for Medicare Part A**, which is hospital insurance that pays for inpatient hospital stays, care in a skilled nursing facility, hospice care and some home health care.
- ♦ **B for Medicare Part B**, which is medical insurance that helps pay for physician services, outpatient hospital care, durable medical equipment, and some medical services that are not covered by Part A
- ♦ **D for Medicare Part D**, which is prescription drug coverage.

Note: IC now captures information about Medicare Part A and B. Part D Medicare prescription drug is also captured separately here.

More information on Medicare Enrollment Database (EDB) maintained by the Center for Medicare and Medicaid (CMS) which contains the Part A and B entitlement start date and entitlement status can be found in the next section. This information is made available for those who are interested but this training session will not go into more detail.

- The **Managed Care Plan** field shows the plan and effective dates if the member is enrolled in a Managed Care Plan.
- If applicable, the **MC Special Condition** field displays the member's Managed Care Level of Care if enrolled in long term care managed care program, and/or enrollment exemption codes and the corresponding effective/end dates.
- Similarly, the **TPL** (Third Party Liability) field will be populated with "yes" if the member has active third party insurance coverage,
- The **Lockin** field will be populated if a punitive restriction has been placed against the member, or if the member is enrolled in a hospice program. If a Lockin is in effect, an indicator with effective dates will populate the field.
- The **NH Level of Care** field is used to display nursing home level of care codes.
- The **Patient Liability** field designates the monthly institutional liability or waiver cost share amounts the member must contribute to their cost of care, along with the effective and end dates of the liability.

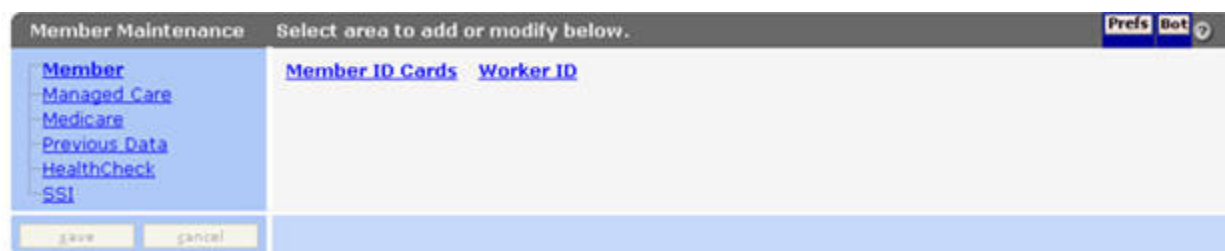
Note: The patient liability panel will include patient liability as well as the Waiver and Family Care cost share. Patient liability and Waiver/FC cost share have now been automated to interface with IC.

- **Deductible** indicates the member's current SeniorCare deductible and effective/end dates. This field does not apply to private insurance.
- The **Last Health Check Screening** field shows the date of the member's last medical screening.
- The **Last Health Check Dental** field below it displays the date of the member's last dental screening.
- Let's move on to the Member Maintenance panel at the bottom of the page.

7.1.3 Member Maintenance Navigation Panel

Step	Action	Response
1.	Using the Member ID scroll down to the Member Maintenance navigation panel.	

Member Maintenance – Member Navigation Panel Graphic



Member Maintenance – Member Navigation Panel Description

- The **Member Maintenance** navigation panel displays six different areas of detailed information for a member. Those areas are on the left side of the panel. Clicking one of the categories displays links on the right side of the panel where authorized users can access information. Division of Juvenile Corrections Staff only have access to **Member** and **Previous Data** links.
 - The **Member** area displays general information about the member such as benefit plan enrollment, divestment and ID card status.
 - The **Previous Data** panels display a Member's previous names, addresses, and IDs.

Member ID Cards Panel

Step	Action	Response
1.	Enter a valid Member ID in the Member ID field in the Search panel.	
2.	Click Search .	The information page for that Member ID displays.
	Scroll down to the Member Maintenance navigation panel and click Member ID Cards .	The Member ID Cards panel displays.

Member ID Cards Panel Graphic

Member ID Cards

Date Issued	Issue Reason	Card Type	Active Indicator	PAN	Source	Return Reason
04/06/2008	New	ForwardHealth ID Card	Active	5077089936355817	PS/2	00 - Active card, not returned

Select row above to view the data.

Date Issued: 04/06/2008
 Card Type: ForwardHealth ID Card
 Address 1:
 Address 2: 3211 GREEN
 Address 3:
 City: LANSING
 State: MI
 Zip: 48910

Issue Reason: New
 PAN: 5077089936355817
 Source: PS/2
 Active Indicator*: Active
 Return Reason*: 00 - Active card, not returned

Member ID Cards Panel Description

- The **Member ID Card** panel allows you to view the member's ID card issuance history, which includes the reason the ID card was issued (it was new, lost, or stolen, etc.). Members can have up to three ID cards active at the same time if they are, or have been, enrolled in ForwardHealth, WWWP, and SeniorCare.
- The **Card Type** represents the type of card(s) that was issued to the member, based on program enrollment.
- The **PAN** (Personal Account Number) is a 16 digit number that uniquely identifies an ID card in the system. It is not related to the member ID.
- Source** identifies the source that initiated the ID card to be created.

Worker ID Panel

Step	Action	Response
1.	Enter a valid Member ID in the Member ID field in the Search panel.	
2.	Click Search .	The information page for that Member ID displays.
	Scroll down to the Member Maintenance navigation panel and click Worker ID .	The Worker ID panel displays.

Worker ID Panel Graphic

Worker ID

Worker ID	Benefit Plan
XDA116	SSIMA - Medicaid for SSI

Type changes below.

Worker ID*: XDA116 Benefit Plan: SSIMA - Medicaid for SSI

delete add

Worker ID Panel Description

- The **Worker ID** panel is used to view the Worker ID of the clerk for the agency responsible for certifying the benefit plan for a given Member.
- Authorized users can use this panel to add, update, or delete Worker IDs.
- The **Worker ID** field displays the Worker ID for the certifying agency.
- The **Benefit Plan** field shows the benefit plan assigned to the Member.

7.1.4 Other ID Search

Step	Action	Response
1.	From the list of iC Functionality links, click Other ID Search .	The Other ID Search panel displays.

Other ID Search Panel Graphic

Member Other IDs Search

Member ID

Records

Step	Action	Response
2.	Enter a valid Member ID number the Member ID field.	
3.	Click Search .	The Search Results will display all current and inactive IDs for the member.

Other ID Search Results Panel Graphic

Member Other IDs Search

Member ID

Records

Search Results

Active	Member ID	Source File	Last Name	First Name	MI
	0782334176	Base	GANNA	DALIS	L

Search Results

Inactive	Member ID	Source File	Last Name	First Name	MI
	0780216854	Conversion	GANNA	DALIS	L

Other ID Search and Search Results Panel Description

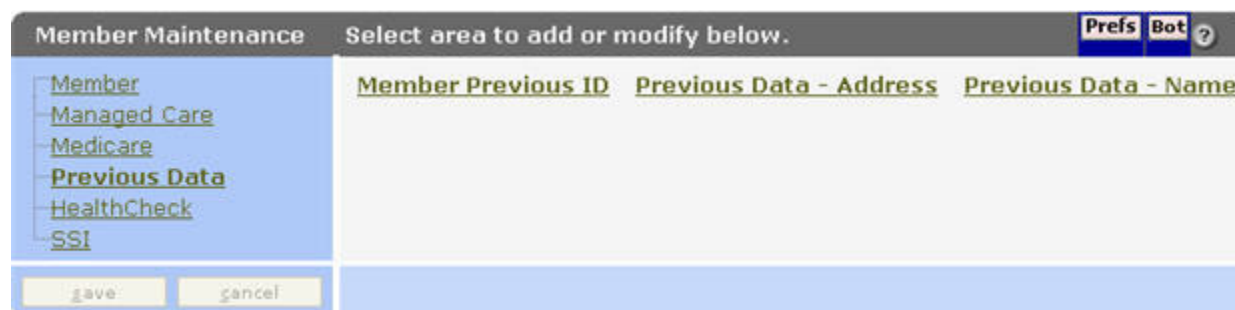
- The **Other ID Search** panel allows a user to view Member IDs that are related to the searched ID.
- An example of a related Member ID might be a previous ID held by the Member or an ID from a case that belongs to the Member.

- If another ID exists, the **Search Results** panel displays the **Current Active ID** number in the first column. The **Source File** column will let the user know how the information was entered in the system. Other IDs might be the result of a converted file or IDs that are linked to another Member ID.

7.1.5 Previous Data

Step	Action	Response
1.	Enter a valid Member ID in the Member ID field in the Search panel.	
2.	Click Search .	The information page for that Member ID displays.
3.	Scroll down to the Member Maintenance navigation panel and click Previous Data .	The Previous Data links display.

Previous Data Panel



Step	Action	Response
4	In the right pane, click the link for the information you wish to view.	The selected panel displays.

Previous Data Panels



Previous Data Panels Description

- The Member Previous Data panels are “view only” panels.
 - The **Member Previous ID** is used to view a Member’s previous Medicaid IDs.

- The **Previous Data – Address** panel displays any previous addresses used by a Member.
- The **Previous Data – Name** displays any previous names used by a Member, such as a maiden name.
- There are two fields, other than the demographic data, that appear on these panels,
 - The **Source** field on the address panel displays the source of the update to the address.
 - The **Change Date** field on the address and name panel displays the date the Member's address was changed in interChange. This is a field the user will find on all of the previous data panels.

7.2 Third Party Liability

7.2.1 TPL Search

Step	Action	Response
1.	From the list of iC Functionality links, select TPL Search .	The TPL Search panel displays.

TPL Search Panel Graphic

TPL Search Panel Description

- The TPL Search panel is used to access a member's TPL records using various criteria.

Step	Action	Response
2.	Enter your search criteria in the fields on the search panel.	
3.	Click Search .	If more than one record is found, a search results panel displays (go to step 4). If only one record is found, the TPL Information Page displays.
4.	Click the desired record from the Search Results.	The TPL Information Page displays.

7.2.2 TPL Information Page Graphic

TPL Information Page Description

- The **TPL Information** page displays the basic information about the member's TPL policy and also provides access to various panels related to that policy.
- The **TPL Information** page consists of:
 - The mini-search panel at the top of the page, which allows users to quickly search TPL records using a Member ID.
 - The **TPL Information** panel displays information on specific health coverage programs for the member.
 - The **TPL Maintenance** navigation panel at the bottom of the page contains links that allow users to access panels with more detailed information regarding TPL.
- The **TPL Information** panel displays the high level health coverage information for a specific carrier for the member.
- Since we have already discussed many of the fields in this panel, let's take a look at those we haven't seen yet.
 - The **MMIS Case** field displays the case number of the member.
 - The **Policy Type** indicates whether the member's resource is private pay insurance or state paid insurance.

- The **Policy Start** and **End Dates** show the effective dates of this coverage.

7.2.3 TPL Maintenance Navigation

- The **TPL Maintenance** navigation panel provides links that allow users to access detailed TPL information.
 - The **Absent Parent** panel displays the information regarding a member's absent parent.
 - The **Additional Policies** panel displays any additional policies the member may have by the Policy Number, the Effective Dates of the policy, and the name of the Carrier, as well as shows a Verification Code.
 - The **Base Information** panel lets users view header level information on a TPL request. This is where the data that populates some of the fields in the TPL Information panel can be updated by authorized users.
 - The **TPL Coverage** panel allows you to view general services coverage information related to TPL by Coverage Code, Coverage Description, and start/end dates.
 - The **Members of Policy** panel lists all members covered under the TPL policy and displays basic information about each member, such as the Member ID, last and first name, SSN and date of birth.

Absent Parent

Absent Parent Panel Graphic

Absent Parent							?
Absent Parent ID	Member ID	Last Name	First Name	MI	SSN	DOB	
240276	3931148249	SMITH	PAM	A	396-94-3563	12/08/1967	

Absent Parent Panel Description

- This panel displays the information regarding a member's absent parent.
- The information includes First and Last Name, Social Security number, date of birth.
- The information also includes the absent parent's identification number.
- If the absent parent is not a member, the **Absent Parent ID** field will display "-1".

Additional Policies

Additional Policies Panel Graphic

Additional Policies					?
Policy Number	Effective Date	End Date	Verification Code	Carrier Name	
100186288200	04/24/2007	12/31/2299	INSURANCE DISCLOSURE	SECURITY ADMINISTRATIVE SERVIC	

Additional Policies Panel Description

- The **Additional Policies** panel displays any additional policies the member may have.
 - The panel displays the **Policy Number**, the **Effective Dates** of the policy, and the name of the **Carrier**.
 - The panel also shows a **Verification Code**, which identifies whether the TPL policy is active or suspect for any reason. These codes are maintained in the **Codes>Verification** panel of the Related Data section of TPL, which we will cover later in this training.
- If you click on one of the additional policies, the TPL Information and TPL Base Information panels are updated with that policy's information. You have to expand the base information to see the full details.

Base Information Panel

Base Information Panel Graphic

Base Information	
Member ID	0780647871
Member Name	FALTO DALIS
Carrier Number	107
Carrier Name	DELTA DENTAL PLAN OF WISCONSIN
Employer ID	
Employer Name	
Relationship	C
Relationship Description	CHILD
Policyholder	Member
Policyholder ID	0782169606
Policyholder Name	BATNEY JONOLA A
Policyholder SSN	802-16-9606
Policy Number	5020100000
Group Number	5020100000
Policy Type	PRIVATE PAY HEALTH INSURANCE
Cost Avoidance	Yes
Original Source	INSURANCE DISCLOSURE
Original Source Date	08/27/2007
Last Change Origin	INSURANCE DISCLOSURE
Verification Code	INSURANCE DISCLOSURE
Verification Date	10/14/2008
Absent Parent Indicator	No
Last Change Date	01/17/2008

delete

Base Information Panel Description

- The **Base Information** panel lets you view header level information on a TPL request. This is where the data that populates some of the fields in the TPL Information panel can be updated by authorized users. Some fields you may not be familiar with include:
 - The **Carrier Number** field displays a unique user-defined carrier ID.
 - **Carrier Name** displays the business name of the associated carrier.
 - **Employer ID** displays a unique, user-defined employer ID which is used on all screens and reports to identify the employer.
 - **Employer Name** displays the name of the employer.
 - The **Relationship** field displays a code that identifies the relationship of the policyholder to the member covered by the TPL policy. This could be **C** for child, **D** for step-child, **E** for self, **O** for other, or **S** for spouse.

- **Relationship Description** contains the description of the Relationship code.
- The **Cost Avoidance** field indicates if this policy is allowed to bypass cost avoidance or not.

Note: *Cost Avoidance, as opposed to Pay and Chase, is when the service provider bills and collects from liable third parties before sending the claim on to Medicaid.*

- **Original Source** displays where the information regarding this policy originated.
- The **Original Source Date** displays the date the resource was originally added to the system.
- The **Last Change Origin** field displays the source of the last revision to the policy information.
- The **Verification Code** indicates whether the TPL resource is verified and, if so, how it was determined to be verified.
- The **Verification Date** field displays the date the resource was verified.
- Finally, the **Absent Parent Indicator field** shows if the policy is held by an absent parent.

Coverage Panel

Coverage Panel Graphic

The screenshot shows a web interface titled "Coverage". It contains a table with the following data:

Coverage Code	Coverage Description	Coverage Start Date	Coverage End Date
03	DENTAL	07/01/2007	12/31/2299

Below the table, there are input fields for each column:

- Coverage Code: 03
- Coverage Description: DENTAL
- Coverage Start Date: 07/01/2007
- Coverage End Date: 12/31/2299

At the bottom right, there are "delete" and "add" buttons.

Coverage Panel Description

- The **TPL Coverage** Panel allows the user to view coverage information related to TPL. Authorized users can select coverages to apply to the TPL policy.
 - **Coverage Code** displays a code that identifies the type of coverage that the TPL policy provides.
 - **Coverage Description** describes the type of coverage that the TPL policy provides.
 - **Coverage Start** and **End Dates** display the effective beginning and end dates of the coverage.

Members of Policy

Members of Policy Panel Graphic

Members of Policy				
Member ID	Member Last Name	MemberFirst Name	Member SSN	Member DOB
0782403692	FALTO	DALIS	802-40-3692	12/23/1961
0782403692	FALTO	DALIS	802-40-3692	12/23/1961
0782403692	FALTO	DALIS	802-40-3692	12/23/1961
0782473317	FALTO	DALIS	802-47-3317	09/22/1961
0782473317	FALTO	DALIS	802-47-3317	09/22/1961
0782473317	FALTO	DALIS	802-47-3317	09/22/1961

Members of Policy Panel Description

- The **Members of Policy** panel lists all members covered under the TPL policy and displays basic information about each member, such as the Member ID, last and first name, social security number and date of birth.

7.2.4 TPL Related Data

Step	Action	Response
1.	From the list of iC Functionality links, select TPL Related Data .	The TPL Related Data panel displays.
2.	In the left pane, click Other .	The Other links display on the right of the panel.

TPL Related Data Panel Graphic

- The TPL Related Data panel provides links to various Third Party Liability information panels. The two panels available to Division of Juvenile Corrections Staff are Absent Parent and Carrier.

Absent Parent

Step	Action	Response
1.	From the links on the right of TPL Related Data panel , click Absent Parent .	The Absent Parent panel displays.

Absent Parent Panel Graphic

The screenshot shows the 'Absent Parent' panel. It has a title bar with a question mark and a blue 'A' icon. Below the title bar, there are two input fields: 'Absent Parent Social Security Number' and 'Last, First Name, MI'. To the right of these fields are two buttons: 'search *' and 'clear'.

Step	Action	Response
2.	Enter a social security number , or at least a last name .	
3.	Click the Search button	The Search Results panel displays.
4.	Select the desired record.	The lower portion of the panel populates with the selected absent parent's information.

Absent Parent Panel Graphic

The screenshot shows the 'Absent Parent' panel with search results. The search fields are filled with 'GANA' and 'CYNTHANIE'. Below the search fields is a 'Search Result' table with columns: Last Name, First Name, MI, and Social Security Number. The table contains 10 rows of results. Below the table is a section titled '-Absent Parent-' with the text 'Type changes below.' and several input fields for 'Last, First Name, MI', 'Social Security Number', 'Date of Birth', 'Sex', and 'Number of Dependents'. There is also a 'Case Head Name' field and a 'Dependents Xref' button.

Last Name	First Name	MI	Social Security Number
GANA	CYNTHANIE		080-00-2772
GANA	CYNTHANIE		080-00-2172
GANA	CYNTHANIE	A	080-00-1346
GANA	CYNTHANIE		000-00-0000
GANA	CYNTHANIE		080-00-1960
GANA	CYNTHANIE	L	080-00-1465
GANA	CYNTHANIE		000-00-0000
GANA	CYNTHANIE	J	080-00-0056
GANA	CYNTHANIE	L	080-00-2576

-Absent Parent- Type changes below.

Last, First Name, MI: GANA CYNTHANIE Case Head Name: [] [] []

Social Security Number: 080-00-2772

Date of Birth: 11/07/1972

Sex: Male

Number of Dependents: 1

Dependents Xref

Absent Parent Panel Description

- The **Absent Parent** panel displays absent parent records received from the Wisconsin Bureau of Child Support.
- These are non-custodial parents who are ordered by a court order to provide TPL coverage to their dependents.
- The **Dependants Xref button** is used to display information on any dependents for whom the absent parent is required to provide TPL coverage.

TPL Other – Carrier Panel

Step	Action	Response
1	On the right of the Related Data – Other panel, click Carrier .	The Other – Carrier panel displays.

Carrier Panel Graphic

Step	Action	Response
2.	Enter a carrier name or number in the Carrier search panel.	
3.	Click Search .	The search results display.
4.	Select the record you wish to display.	The Carrier panel the information displays in the lower section of the panel.

Carrier Panel Graphic

Search Results					
Carrier Number	Carrier Name	Address 2	City	Contact Name	Phone Number
P88	HARTFORD INSURANCE GROUP	PO BOX 29164	SHAWNEE MISSION		(800)654-3151
632	HARTFORD LIFE INSURANCE CO	3033 W JEFFERSON ST	JOLIET		(000)000-0000
S60	HARTFORD INSURANCE CO	3800 W 80TH STREET	BLOOMINGTON		(000)000-0000
B51	HARTFORD LIFE INSURANCE	PO BOX 59179	MINNEAPOLIS		(800)833-5575
G37	HARTFORD LIFE INSURANCE	PO BOX 8895	ST LOUIS		(314)567-9600
U91	HARTFORD INSURANCE	PO BOX 4879	DIAMOND BAR		(000)000-0000
I69	HARTFORD INSURANCE GROUP	PO BOX 4925	SYRACUSE		(000)000-0000
N12	HARTFORD INSURANCE GROUP	PO BOX 757	SHAWNEE MISSION		(800)633-9636
R39	HARTFORD INSURANCE	1 WEST ILLINOIS	ST CHARLES		(000)000-0000
R71	HARTFORD INSURANCE GROUP	PO BOX 2999	HARTFORD		(800)572-9047

1 2 Next >

Type changes below.

Carrier Number	632	Contact Name	
FEIN		Phone Number	(000)000-0000
Carrier Name	HARTFORD LIFE INSURANCE CO	Fax Number	
Address 1		Billing Media	PAPER
Address 2	3033 W JEFFERSON ST	Policy Indicator	
City	JOLIET	Insurance Disclosure Indicator	No
State	IL	Active Indicator	INACTIVE
Zip	60435	Dependent Indicator	No

add delete Chrono Notes Carrier Cov.

-Correspondence Address- Type changes below

*** No rows found ***

delete add

Carrier Panel Description

- The **Carrier** panel contains information about insurance companies that cover Wisconsin residents.
 - The address displayed is the **claim submission address**, which is used for all claim facsimile billings.
 - If there is a separate correspondence address, it is maintained on another panel that displays below the main panel. The correspondence address is used for all non-facsimile correspondence but is not used by Financial.
 - Authorized users can add and delete carriers using **add** and **delete** buttons.
 - The **Contact Name** is used to address all questions concerning the policy and the carrier
 - FEIN** displays the Federal Employer Identification Number of the carrier.
 - Carrier Name** displays the business name of the insurance carrier.
 - The **Policy Indicator** field indicates whether the carrier is an HMO or PPO policy provider.
 - The **Insurance Disclosure** Indicator displays whether or not the carrier participates in Insurance Disclosure.
 - The **Active Indicator** field displays whether the carrier is active or inactive.
 - The **Dependent Indicator** field identifies whether or not the carrier participates of Dependent Indicator

8 Provider

8.1.1 Provider Search

Step	Action	Response
1.	From the iC Functionality links, click Provider .	The Provider Search panel displays.

Provider Search Panel Graphic

The screenshot shows the 'Provider Search' panel. It includes input fields for Provider ID, License, Medicare, SSN, Tax ID, Business OR Last Name, First, MI, and Financial Payer. There are search and clear buttons, and a records per page dropdown set to 20.

Provider Search Panel Description

- You will generally use the Provider Search function to find provider numbers in order to complete the Remaining Deductible forms that are sent to EDS-HP.
- Business or Last Name** and **First Name** is the field you will use when completing search. However, as you will soon see, performing a search using the name field can return numerous records. You will be able to sort on any of the headers.
- Financial Payer** displays the unique program the provider bills to. Examples include Medicaid, Wisconsin Chronic Disease Program (WCDP), Wisconsin Well Woman Program (WWWP) and SSI. By selecting Medicaid, you may limit the results returned.

Step	Action	Response
2.	Enter your search criteria in the fields on the search panel.	
3.	Click Search .	If more than one record is found, a search results panel displays (go to step 4). If only one record is found, the Provider Information Page displays.
4.	Click the desired record from the Search Results.	The Provider Information Page displays.

8.1.2 Provider Information Page

Provider search by:	ID Number	Business OR Last Name, First	Tax ID	search	clear
---------------------	-----------	------------------------------	--------	--------	-------

Provider Information	
Base ID 3630	Organization Other
Restriction No	Provider Type 25 - Medical Equipment Vendor
Gender N/A	
Ownership No	Licenses
Service Location 41704900 - GENERAL HOSPITAL #55245	Specialties Medical Equipment V 07/21/1999-12/31/2299
Provider IDs 41704900 MCD 07/21/1999-12/31/2299	Taxonomies 332B00000X - Durable Medical Equipment
Address Type Service Location	Tax ID 00067946 07/21/1999-12/31/2299
Address B307 AVENUE	Contract Hearing Services 07/21/1999-03/31/2002
PO BOX 001	Medicare
City CABBAGE	Certification
County Grant	Accept New Patients
State/Zip WI 00160	Managed Care No
Phone 608-555-0103	Recert Date 03/01/2009
Fax	

Provider Maintenance	
Select area to add or modify below.	
Provider Service Location	
save	cancel

Provider Information Page Description

- The **Provider Information** page displays the basic information about the provider.
- The **Provider Information** page consists of:
 - The mini-search panel at the top of the page, which allows you to quickly search Provider records using a Provider ID.

Note: This is the same panel that displays if you select the *Provider Information* link, so we don't discuss that here.

- The **Provider Information** panel displays information on specific health coverage programs for the member.
- The **Provider Maintenance** panel also displays, but there are no information that can be accessed on this panel.

8.1.3 Provider Information Panel

- The **Provider Information** panel provides detailed information on a provider.
 - The **Address** lines, **Phone** number, and the **Fax** number fields are self-explanatory.
 - The **Service Location** field utilizes a drop-down menu to list all the service locations for the provider's Base ID. Select this number to include with the NPI and address zip code to include on the remaining Spenddown form.

Service Location 30409800 - MCCOOL, THOMAS J [v] [i]

- **Provider IDs** drop-down field can be used to view a list of all the Provider IDs associated with this provider and the period of time each ID was active.
 - ◆ Next to the Provider ID you will see three initials that indicate the type of ID listed, it will either be NPI for the National Provider ID, or MDC for a ForwardHealth Assigned ID. You may also see CNV for a Converted ID or BSE for a Base ID. Always choose the NPI number.
 - ◆ One other thing to notice on this field is the Provider ID Effective and End Dates. This signifies the period the specific ID is in effect. If the End date is 12/31/2299, it signifies an open end date. Use the current ID for the remaining deductible form.

Provider IDs 1992805667 NPI 01/02/1900-12/31/2299 [v]

- The **Address Type** field will always show Service Location, which is the physical address listed for the provider's practice. Select the **provider Zip code** from the address to include with the **NPI ID** and **Service Location** number.

8.2 Claims Search

8.2.1 Claim Search Panel

Step	Action	Response
1.	From the iC Functionality links, click Claims Search .	The Claim Search panel displays.

Claim Search Panel Graphic

Claim Search Panel Description

- The **Claim Search** panel allows you to search for claims using the following selection criteria.
 - Member ID**
 - FDOS** (From Date of Service) is the date of first service on the claim.

And

- TDOS** (To Date of Service) is the date of last service on the claim.

Note: If you enter only one date, the other date will default to the same date and the search will return only results for that date.

- You are also required to enter at least one of these fields:
 - Claim Type** is the indicator or nomenclature of the claim processed in interChange based on claim form or electronic transaction.
- Or**
- Claim Form** is the form type of the claim to be selected as part of the search criteria, such as **Dental** or **Pharmacy**. You must click the **Advanced Search** button to display the Claim Form Field

8.2.2 Claims Search Results Panel

Step	Action	Response
2.	Enter a valid Member ID .	
3.	Enter either the Claim Form or Claim Type .	
4.	Enter the FDOS and TDOS .	
5.	Click Search .	The Claims Results panel displays.

Claims Search Results Panel

The screenshot shows the 'Claim Search' panel with the following details:

- Member ID:** 0782331632
- Claim Type:** M - Professional Claims
- FDOS:** 01/01/2004
- TDOS:** 10/01/2008
- Records:** 20
- Buttons:** search, clear, adv search

The **Search Results** table displays the following data:

ICN	Member ID	Provider ID	Fin Payer	FDOS	TDOS	Clim Type	Benefit Plan	Clim Str	Payment Date	Amount Billed	Amount Paid	Rx Number
4007166023860	0782331632	41497900	MCD WISC_TXIX	06/06/07	06/06/07	M	N/A	P	06/17/07	\$66.40		
4007173034975	0782331632	41497900	MCD WISC_TXIX	06/11/07	06/11/07	M	N/A	P	06/24/07	\$33.20		
4007221002025	0782331632	41497900	MCD WISC_TXIX	08/01/07	08/01/07	M	N/A	P	08/12/07	\$76.55		

- The **Claim** Search Results panel displays information about claims matching the search criteria:

- **ICN (Internal Control Number)** - a unique identification number assigned to each claim in the system. The ICN is the identifying means through which each claim is processed, tracked, and reported.
- Notice that the **Financial Payer** is Title 19 (**TXIX**), and that the **Health Program** (also referred to as the *Benefit Plan*) used is **MCD**.
- The three-letter code after the Provider ID shows the **Health Program** used to process the claim. Such as MCD for Medicaid.
- **Financial Payer** displays the unique organization the claims transactions processed under. Examples include Title 19 (WISC-**TXIX**), which is Medicaid/BadgerCare, WCDP (Wisconsin Chronic Disease Program), WWWP (Wisconsin Well Woman Program) and County Waivers.
- That's followed by the From and To Dates of Service.
- Other important data is the **Claim Status**. Valid values include: "P" = Pay, "S" = Suspend, "D" = Deny, "X" = Super-Suspend, "R" = Resubmit.
- And the **Payment Date** and the **Amount Billed** and **Amount Paid**.

9 General Portal Information

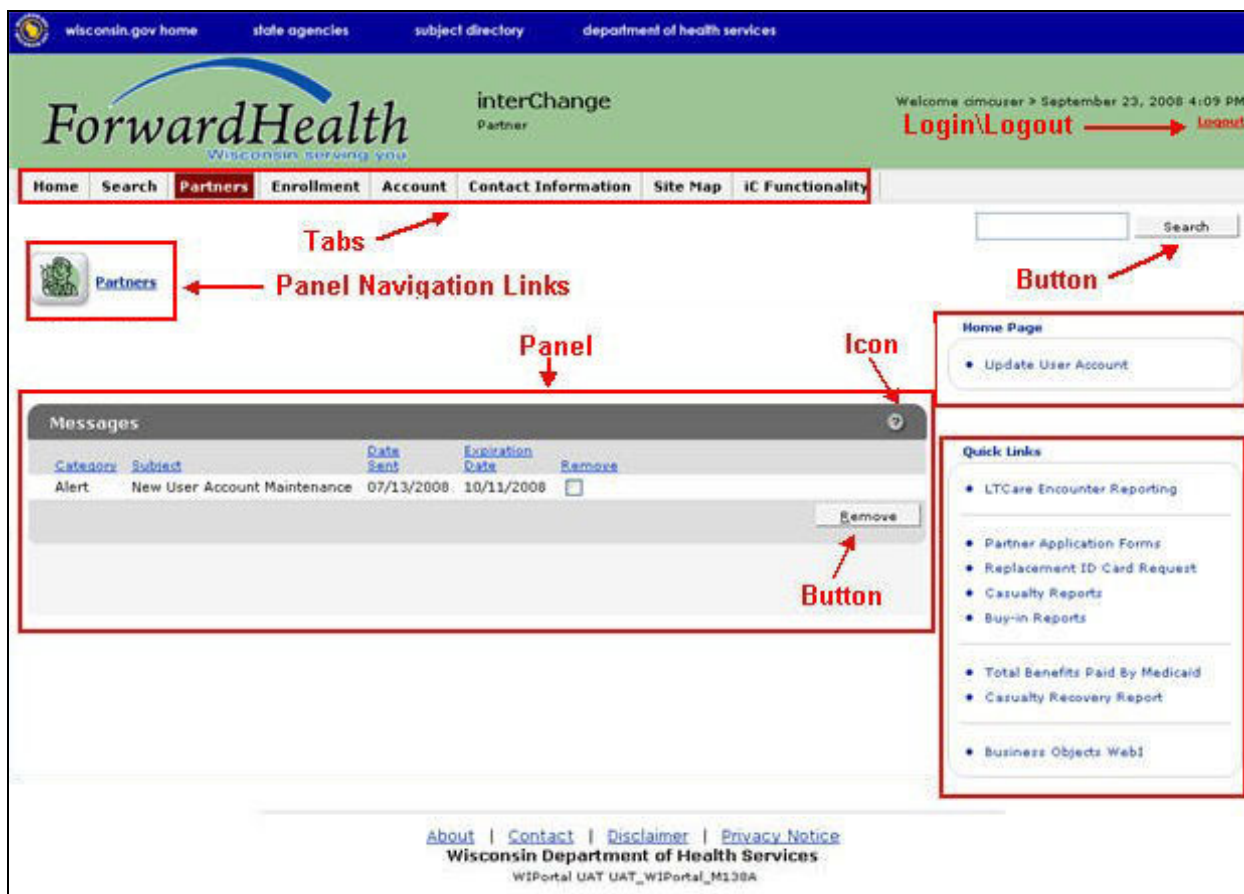
9.1 Logging On and Off the Portal

The quickest way to log onto the Portal is to click the **Login** link in the upper-right corner of any screen, and enter your username and password. Once you log in, the link changes to **Logout**.

When you are finished with any session, always remember to click the **Logout** link.

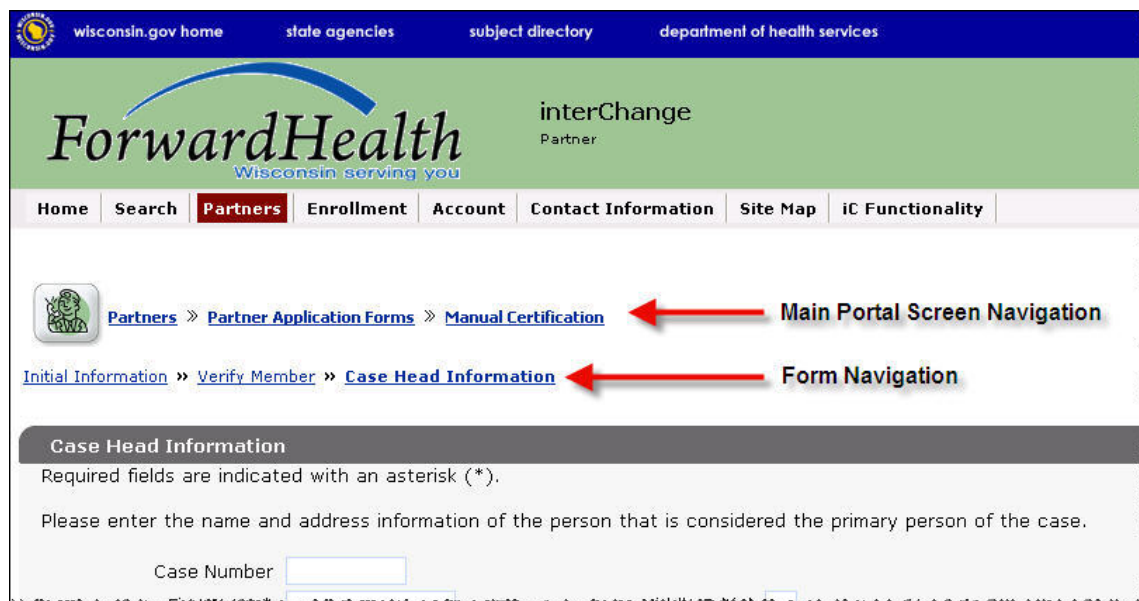
9.2 Portal Navigation

There are several navigation features on every screen and/or panel that display on the portal pages and panels.



- **Tabs**—Once you log in to the secure partner portal, the first tab that displays is the Partners tab. Click on any other tab to move to different parts of the Portal.
 - ♦ **Home** takes you back to the public portal Home page.
 - ♦ **Search** displays a text box to enter text, and you can select an area to search Partners
 - ♦ **Enrollment** displays the Enrollment Verification panel, which lets you verify that a member is enrolled through his or her Member ID or SSN, and date of birth. This is a summary level verification tool.

- ♦ **Account** lets you manage your main account information, messages, and change your password. It also contains a link to the user guide for this tab, which is in PDF format.
- ♦ **Contact Information** lets you ask a question of tech support.
- ♦ **Site Map** is a series of links that imitate the tab structure and tab choices.
- ♦ **iC Functionality** is a subset of the panels you can access through the portal which Provide more detailed member information.
- ♦ **Panel**—The panel shown here is the Message panel that lets you know if there are any changes or new items for the Partner portal.
- **Login/Logout**—This is a link that toggles between displaying the username/password text boxes (**Login**) or logging you out of the system (**Logout**).
- **Other features:** links at the bottom (About, Contact, Disclaimer, Privacy Notice) and top (Wisconsin.gov home, state agencies, subject directory, and department of health services) are part of every standard portal window and lets you know State-specific information.
- **Panel Navigation** links—One of the features of the portal to help you track what links you've clicked to end up on the current screen, such as shown in this example:



- The Main Portal Screen Navigation displays links display you clicked from the main Partner page to get to your present form or screen.
- The Form Navigation links display tells you how far you've progressed into an online form, as well as the order. If you click the **Previous** button, you will go one link backwards; for example, from **Case Head Information** to **Verify Member**. If you click on a navigation link, you go directly to that page or panel.
- It is important to note that users should **never** use your browser's **BACK** button to return to a previous screen.

9.2.1 Buttons

Below is a list of common buttons and the operations they are normally used for.

Button	Click it and this happens
Clear	Clears all the information entered into the fields on a panel.
Close	Closes a window, such as a popup window.
Save	Saves a modification made to a panel or a new record (for authorized users that can make updates)
Remove	Deletes an onscreen message.
Search	Initiates a search.

9.2.2 Error Messages

Error messages most commonly appear when you enter information incorrectly in a field or when you do not enter information in a required field. These error messages display just beneath the navigation links at the top of a panel but may also appear next to a field that is in error. Messages also display as a warning that the user is navigating away from a page.



[Partners](#) » [Partner Application Forms](#) » [Manual Certification](#)

[Initial Information](#) » [Verify Member](#) » [Case Head Information](#)
[Eligible Case Members](#)

The following messages were generated:

Last Name is required.

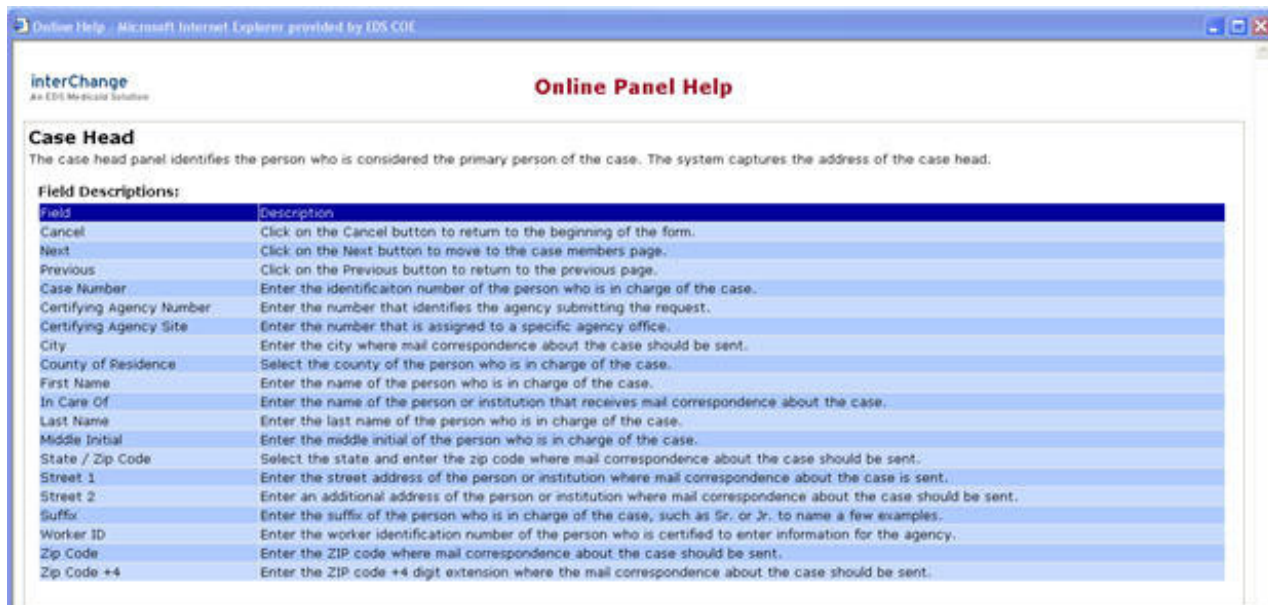
- If unsure what an error message means, users can find more error message information by clicking the question mark icon on the gray bar at the far right of each screen. The panel help with all field descriptions and error messages will appear.

9.3 Partner Portal Online Help

9.3.1 Panel Help

Panel help is accessed by clicking the question mark icon on the gray bar at the far right of each screen.





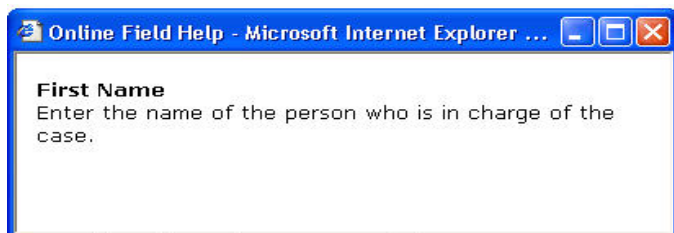
Panel Help Feature - Question Mark Function Description

- The panel help lists the name of all fields and buttons on the panel (buttons alphabetically first, then fields alphabetically), along with their descriptions and error messages. These descriptions are the same as what users see when users access field help.

9.3.2 Field Help

- If users hover over the name of a field, users will see a question mark:

- When you click on the field, you see a pop-up box that includes the field description.



10 Contact Information

EDS-HP is responsible for providing support to IM Workers. The document below provides contact information for EDS-HP.

Agency Assignments Eligibility PO Box 7636 Madison, WI 53713 (608) 221-4746	<u>EXTENTION 80221</u>	<u>EXTENSION 80220</u>	<u>EXTENSION 80213</u>
	001 Adams 002 Ashland 003 Barron 004 Bayfield 005 Brown 006 Buffalo 007 Burnett 008 Calumet 009 Chippewa 010 Clark 011 Columbia 012 Crawford 013 Dane 014 Dodge 015 Door 016 Douglas 017 Dunn 018 Eau Claire 019 Florence 020 Fond du Lac 021 Forest 022 Grant 023 Green 024 Green Lake 025 Iowa 026 Iron 027 Jackson 028 Jefferson 029 Juneau 041 Monroe 042 Oconto 043 Oneida	040 Milwaukee 044 Outagamie 045 Ozaukee 046 Pepin 049 Portage 051 Racine 053 Rock 058 Shawano 059 Sheboygan 060 Taylor 061 Trempealeau 062 Vernon 063 Vilas 070 Winnebago 071 Wood 072 Menomonie 080 RNIP 090 RNIP 100s - 600s	030 Kenosha 031 Kewaunee 032 LaCrosse 033 LaFayette 034 Langlade 035 Lincoln 036 Manitowoc 037 Marathon 038 Marinette 039 Marquette 047 Pierce 048 Polk 050 Price 052 Richland 054 Rusk 055 St. Croix 056 Sauk 057 Sawyer 064 Walworth 065 Washburn 066 Washington 067 Waukesha 068 Waupaca 069 Waushara 830 Katie Beckett
STAFF/CERTIFYING AGENCY ASSIGNMENTS		Eligibility Supervisor Eligibility Team Lead Nursing Home Authorization SLMB/QMB/Buy-In EDS TPL/COB	Ext. 80202 Ext. 80201 Ext. 80201 Ext. 80216 Ext. 80058

Resource Prior to November 10, 2008 <u>ForwardHealth interChange Implementation</u>	Resource On and After November 10, 2008 <u>ForwardHealth interChange Implementation</u>
Member Services (BadgerCare Plus and Medicaid) 800-362-3002 <ul style="list-style-type: none"> Available 7:30 a.m.-5:00 p.m. Monday-Friday Member Services (WCDP) 608-221-3701 <ul style="list-style-type: none"> Available 8:30 a.m.-4:30 p.m. Monday-Friday Member Services (WWWP) - Not currently available	Member Services (all programs except SeniorCare) 800-362-3002 <ul style="list-style-type: none"> Available 7:00 a.m.-6:00 p.m. Monday-Friday
Member Services (SeniorCare) 800-657-2038 Available 7:30 a.m.-5:00 p.m. Monday-Friday	Member Services (SeniorCare) 800-657-2038 Available 7:00 a.m.-6:00 p.m. Monday-Friday
Medicaid Managed Care Contract Monitors and Ombudsmen 800-760-0001 <ul style="list-style-type: none"> Recipient appeals and grievances regarding State Contracted Managed Care Organizations Available 8:00 a.m.-4:30 p.m. Monday-Friday 	ForwardHealth Managed Care Ombudsmen (BadgerCare Plus only) 800-760-0001 <ul style="list-style-type: none"> Recipient appeals and grievances regarding State-Contracted Managed Care Organizations Available 8:00 a.m.-4:30 p.m. Monday-Friday
Medicaid and BadgerCare Plus Web Sites <ul style="list-style-type: none"> dhs.wisconsin.gov/medicaid/ dhs.wisconsin.gov/badgercareplus/ ForwardHealth Implementation Information Web Site <ul style="list-style-type: none"> dhs.wisconsin.gov/forwardhealth/ ForwardHealth Portal Web Site – Trading Partners only <ul style="list-style-type: none"> www.forwardhealth.wi.gov/ 	ForwardHealth Portal Web Site – Providers, Trading Partners, Partners, HMOs <ul style="list-style-type: none"> www.forwardhealth.wi.gov/ ForwardHealth Portal Web Site – Members <ul style="list-style-type: none"> www.forwardhealth.wi.gov/members
Webcasts <ul style="list-style-type: none"> dhs.wisconsin.gov/forwardhealth/ 	Webcasts <ul style="list-style-type: none"> www.forwardhealth.wi.gov/

Appendix A - ForwardHealth Benefit Plans

Full Benefit Plans	Note: BadgerCare, Family MA & Healthy Start med stats (benefit plans) ended 01/31/08. They were replaced by BadgerCare Plus effective 02/1/08.
BC	BadgerCare
BCSP	BC+ Standard Plan
BCBP	BC+ Benchmark Plan
BCBPD	BC+ Benchmark Plan and Dental
MCD	Medicaid
MCDW	Medicaid Waiver
MAPW	Medicaid Purchase Plan Waiver
MAP	Medicaid Purchase Plan
WWMA	Wisconsin Well Woman Medicaid
SSIMA	Medicaid for SSI
FSTMA	Medicaid for Foster Care
Limited Benefit Plans	
BCBEE	BC+ Benchmark Express Enrollment for Pregnant Women
BCSEE	BC+ Standard Express Enrollment for Pregnant Women
PE	Presumptive Eligibility - Pregnancy
FPW	Family Planning Services Only
FC	Family Care Non-MA
QMB	Qualified Medicare Beneficiary
SC1	Senior Care Level 1- 0 to 200% FPL
SC2	Senior Care Level 2- Over 200% FPL
WCDK	Wisconsin Chronic Disease-Renal Disease
WCDH	Wisconsin Chronic Disease-Hemophilia HomeCare
WCDC	Wisconsin Chronic Disease-Adult Cystic Fibrosis
WWWP	Wisconsin Well Woman Program
Benefit plans without health services	There are no health care services payable for these benefit plans. The state pays Medicare premiums or issues other cash benefits.
SLB	Specified Low-income Medicare Beneficiary
SLB+	Specified Low-income Medicare Beneficiary Plus
QDWI	Qualified Disabled Working Individuals
SSI	State Supplemental Payment - State Supplemental Income
SSIE	State Supplemental Payment - State Supplemental Income Exceptional
CTS	State Supplemental Payment - Caretaker Supplement